

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

Sacramento 14
January 29, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare.

DEPARTMENT BULLETIN NO. 405 (Revised) (OAS, ANB, APSB)

These regulations were approved by the State Social Welfare Board pursuant to the powers conferred upon it by the Welfare and Institutions Code, Sections 103, 103.5, 103.6, 115, and 116 on January 17, 1952, and are being filed in accordance with Sections 11380, 11421(b), and 11422(c) of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

C. I. Schottland

Charles I. Schottland
Director

Attachments

FILED

in the Office of the Secretary of State
of the State of California

JAN 30 1952

At 2:50 o'clock P.M.

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

CHARLES I. SCHOTTLAND
Director

W & IC 103, 103.5, 103.6,
115, 116
EARL WARREN
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE **FILED**
In the Office of the Secretary of State
of the State of California

616 K STREET

SACRAMENTO 14

January 28, 1952

JAN 30 1952

DEPARTMENT BULLETIN NO. 405 (Revised) (OAS, ANB, APSB)

TO: COUNTY BOARDS OF SUPERVISORS
COUNTY WELFARE DEPARTMENTS
COUNTY AUDITORS

At 2:50 o'clock P. M.
FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

Subject: Old Age Security Permanent Sample
Schedule, and Social Data Record
Card - Aid to the Blind

Department Bulletin No. 405 is hereby revised to eliminate, effective February 1, 1952, the requirement of submitting Form Temp 302 Ag, Old Age Security Eligibility Analysis, and Form Temp 302 Bl, Security for the Blind Eligibility Analysis, and to provide for reporting personal property information on Form Ag 251, Old Age Security Permanent Sample Schedule, and on Form Bl 230, Social Data Record Card - Aid to the Blind.

Old Age Security Permanent Sample Schedule, Form Ag 251, and Discontinuance of Form Temp 302 Ag

Manual of Policies and Procedures Sections 290-00 through 299-99 shall apply, except Sections 292-40 and 292-45 which are obsolete.

Form Temp 302 Ag and Ag 251 - Counties shall no longer submit Form Temp 302 Ag, Old Age Security Eligibility Analysis, on OAS Permanent Sample Cases. Information on personal property shall be reported in Items Q and R, Form Ag 251, OAS Permanent Sample Schedule.

Personal Property - Item Q on Form Ag 251 - In Item Q, show the total value of all personal property which is considered in determining eligibility and the total encumbrances thereon. Exclude the value of personal property not considered in determining eligibility; i.e., personal effects, property in escrow. (See Section A-730 of the Manual of Policies and Procedures - Old Age Security.) Disregard references to W&IC Sections 2163 to 2163.7 and to Manual Section 292-40 which appear on the form.

Life Insurance - Item R on Form Ag 251 - In Item R, circle sub-item 1, Non-exempt insurance, and/or sub-item 3, Burial trust, if personal property includes such items. Disregard sub-item 2, Exempt insurance, and the references on the form to Manual Section 292-45 and W&IC Sections 2163 to 2163.6.

Reporting Status of Case on Form Ag 251 - To show whether the schedule is for a new application, reinvestigation, restoration, or reapplication, circle the number (1, 2, 3, or 4) appearing before the appropriate statements in the last sentence of the instructions printed in bold type italics on Form Ag 251.

Social Data Record Card - Aid to the Blind, Form Bl 230 (ANB-APSB), and Discontinuance of Form Temp 302 Bl

Manual of Policies and Procedures Sections 285-00 through 287-90 and Section 289-99, shall apply except Sections 287-59 and 287-75 which are obsolete. In addition, the following is required:

1. The portion of Form Bl 230 in the lower right hand corner shall be completed. Entries shall be as follows:
 - a) status of case: indicate whether the case is new or is being reinstated (note that Form Bl 230 is not required on "restored" cases);
 - b) amount of this grant: indicate the amount approved for the case;
 - c) other income: write in each source of income (other than the grant) and the amount received from each source. If there is no income, write "none";
 - d) total need: to the right of the space allotted to "other income" enter the total need computed for the recipient, e.g., "T.N. \$98". This figure can not be less than \$35;
 - e) education and employment: the three items under this heading are self-explanatory.

Forms Temp 302 Bl and Bl 230 - Counties shall no longer submit Form Temp 302 Bl, Security for the Blind Eligibility Analysis, on cases of Aid to Needy Blind and Aid to Partially Self-supporting Blind Residents. Information on personal property shall be reported in Items 21 and 22, Form Bl 230, Social Data Record Card - Aid to the Blind.

Personal Property - Item 21 on Form Bl 230 - In Item 21, enter in sub-items a, b, and c the values of cash, securities, and other personal property which are considered in determining eligibility and the amount of encumbrances thereon. (See Section B-457 of the Manual of Policies and Procedures - Aid to the Blind.) Exclude the value of personal property not considered in determining eligibility; i.e., property in escrow (Manual Section B-478), in ANB, personal effects (Manual Section B-454), and in APSB, certain insurance (Manual Section B-463). Disregard the reference on the Form to Manual Section 287-75.

Life Insurance - Item 22 on Form Bl 230 - In Item 22, for ANB, circle sub-item a or c, whichever is applicable, and disregard sub-item b. For APSB, circle sub-item a, b, or c whichever is applicable. (See Manual Section B-463 regarding determination of exempt and non-exempt insurance.) Disregard the reference on the Form to Manual Section 287-59.

Information on Real Property shall be reported in Item 23, Form Bl 230 in accordance with Manual Sections 287-60, 287-65 and 287-70.

Department Bulletin No. 405 is now obsolete.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Certified as a Regulation (or as
Regulations) of the

Dept of Social Welfare
(Name of State Agency)

Charles I. Schoultz
(Signature)

Director
(Title)

2-28-52
(Date)

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STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

Sacramento 14
February 28, 1952

ADDRESS REPLY TO:

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Aid to the Blind Manual Letter No. 8.

These regulations were adopted by the State Social Welfare Board on February 15, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.6, and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

These regulations are effective April 1, 1952, except for Sec. B-509 which is effective March 1, 1952.

The regulations in Section B-509 are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public procedure.

Very sincerely yours,

Charles I. Schottland

Charles I. Schottland
Director

Attachments

FILED

In the Office of the Secretary of State
of the State of California

FEB 29 1952

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

6
11.11.11

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

February 25, 1952

AID TO THE BLIND MANUAL LETTER NO. 8

The attached revisions numbered 74 through 84 are to be entered in your copy of the Manual of Policies and Procedures - Aid to the Blind and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on February 15, 1952. Secs. B-249, B-540, B-542, and B-703 are to be effective April 1, 1952, and Sec. B-509 is to be effective March 1, 1952.

The revision in Sec. B-249 clarifies the provision that an applicant may choose the kind of eye examination to be made, i.e., either ophthalmological or optometric.

Sec. B-509 has been revised to provide that residents of The California School for the Blind and resident trainees of State Orientation Centers for the Blind are not considered inmates of public institutions for purpose of aid.

Sec. B-542 has been revised to eliminate the listing of sources of income considered exempt.

Sec. B-703 has been revised to eliminate the requirement that, in inter-county transfers, a new application be taken by the second county when responsibility for payment of aid is transferred.

Sec. B-283 has been corrected to add the name "A. B. Root" to the list of authorized optometrists for eye examinations. This name was inadvertently omitted from the list issued November 16, 1951.

Revised Forms Bl 227 and 227A are being attached for inclusion in the chapter on "Forms".

FILED

In the office of the Secretary of State
of the State of California

FEB 29 1952

11-10
am

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

B-246 (Continued)

B-246

(In general, an individual meeting the definition of blindness with a visual acuity of 20/200 in the better eye may be considered to have 1/10th of "normal vision" in that eye; a person with a visual acuity of 10/300 vision may be considered to have 1/30th of "normal vision." A person with a visual acuity of 20/100, which is better vision than 20/200, may be considered to have 1/5th of "normal vision.")

(In general, a person whose field of vision is so impaired as to come within the definition of blindness, or restricted to 20 degrees, may be described as being able to see an object as though he were looking through a gun barrel. This is frequently called "gun barrel vision.") (W&IC 3005, 3050, 3075, 3403, 3460)

B-249 DETERMINATION OF DEGREE OF BLINDNESS

B-249

An eye examination by a duly licensed and practicing physician, skilled in diseases of the eye, or a duly licensed and practicing optometrist, is required by law to establish eligibility and continuance of eligibility. (See Sec. B-264, Neuropsychiatric Examinations)

A. EXAMINATIONS BY AUTHORIZED PHYSICIANS OR OPTOMETRISTS

All examinations to establish degree of blindness must be made by the physicians or optometrists authorized by the SDSW. Unless specific authorization is obtained from the SDSW, eye examinations shall be made only by a physician whose name appears in Sec. B-282, List of Authorized Physicians for Eye Examinations, or by an optometrist whose name appears in Sec. B-283, List of Authorized Optometrists for Eye Examinations. The individual shall have a choice of the kind of eye examination to be made, i.e., either ophthalmological or optometric. The individual shall have a choice of which authorized examiner in his locality (ophthalmologist or optometrist) is to make the examination. If no examiner of the category he chooses (ophthalmologist or optometrist) is available in the locality in which he lives, the nearest examiner of his choice shall be used.

B. REPORTS IN WRITING AND FROM CLINICS

Two copies of the report of the eye examination shall be completed in writing over the signature of the physician or optometrist who made the examination. The form of the report, Report of Eye Examination, Form Bl 227 and Bl 227A, is prescribed by the SDSW. Reports of examinations from clinics cannot be accepted unless the physician or optometrist who made the examination and signed the report is one on the lists of authorized examiners.

C. OUT-OF-STATE EXAMINATIONS

Out-of-state physicians or optometrists who have been authorized by the SDSW to make eye examinations appear at the end of the lists, and individuals may be referred to them for eye examinations when they are the nearest examiners available. The names and addresses of physicians or optometrists not on the list who can be authorized to make examinations for persons visiting out-of-state may be obtained by writing to the SDSW. The individual's out-of-state address must be included in the letter. (W&IC 3075, 3083, 3460, 3471)

B-243 BLINDNESS--ELIGIBILITY REQUIREMENT

B-243

To be eligible for aid to the blind a person's visual impairment must come within the definition of economic blindness as defined and determined in Sections B-246 and B-249.

(W&IC 3005, 3050, 3075, 3403, 3460)

B-246 DEFINITION OF BLINDNESS

B-246

The definition of economic blindness as used to determine eligibility follows:

1. In general, central visual acuity of 20/200 or less in the better eye, with the aid of the best possible correcting glass, shall be considered blindness.
2. Central visual acuity better than 20/200 shall be considered as blindness only when the peripheral field has contracted to such an extent that the widest diameter of the remaining visual field is not greater than 20 degrees. The maximum diameter of the field is taken into consideration and not the radius.
3. In cases where central visual acuity is better than 20/200 and remaining peripheral fields exceed 20 degrees, but are so placed, or shaped, as to be of little practical use, or in an operated eye when the State Ophthalmologist feels that the disability inherent in the eye condition present indicates greater disability than the usual 20/200, the State Ophthalmologist shall use his discretion in recommending approval for aid if the report of pathology is of such character as to prevent applicant from providing himself with the necessities of life.

An individual with a central visual acuity of 20/200 can identify a standard object (the Snellen Test Character) at a distance of twenty feet, while an individual with normal vision can identify the same object at a distance of 200 feet. This statement relates to distance vision.

Central visual acuity is indicated by a fraction; the numerator indicates the distance of vision as measured by feet, and the denominator indicates the size of the letter which can be seen on the Snellen Testing chart. For example, 6/200 central visual acuity indicates the applicant can read a "200 foot" letter on the chart at a distance of six feet.

The applicant must have 20/200 or less, such as 3/200, 15/200, 10/300, or 15/400, to be eligible for aid on the basis of central visual acuity.

(Section Continued on Next Page)

B-282 (Continued)

B-282

SAN JOAQUIN COUNTY

Broadus, C. A.	242 North Sutter Street	Stockton 2
Brody, Yale	127 East Acacia Street	Stockton
Plageman, William H.	242 North Sutter Street	Stockton 2
Powell, Dewey R.	Medico-Dental Building	Stockton 2
Powell, James R.	Medico-Dental Building	Stockton 2
Saslaw, Lewis B.	Bank of America Building	Stockton
Tipshus, Alfons F.	242 N. Sutter Street	Stockton 2

SAN LUIS OBISPO COUNTY

Beresky, Tibor	1170 Marsh	San Luis Obispo
Kelker, G. David		Cayucos

SAN MATEO COUNTY

Murphy, William H.	205 3rd Avenue	San Mateo
Sharpe, Otis Allen	251 Park Road	Burlingame
Sherwood, Robert O.	128 Primrose Road	Burlingame
Westsmith, Richard A.	30 South El Camino Real	San Mateo

SANTA BARBARA COUNTY

Campbell, J. Gary	1525 State Street	Santa Barbara
Gibb, W. Blake	1515 State Street	Santa Barbara
Hombach, Frank J.	1421 State Street	Santa Barbara
Loutfallah, Michel	1826 State Street (Also Ventura County)	Santa Barbara
Mesirow, Maurice E.	117 E. Cook Street	Santa Maria
Richards, John M.	1534 State Street	Santa Barbara
von Zelinski, W. F.	22 W. Islay Street	Santa Barbara

SANTA CLARA COUNTY

Beard, Crowell	St. Claire Building	San Jose 23
Cassell, Irving	St. Claire Building	San Jose 23
Lee, Dorothea	Medico-Dental Building	San Jose 20
Liebenberg, Henry S.	123 South Third Street	San Jose 12
Martin, P. T.	Medico-Dental Building	San Jose 20
Reinhardt, Paul H.	300 Homer Avenue	Palo Alto
Rosehill, David B.	Bank of America Building	San Jose 16

(Section Continued on Next Page)

B-282 (Continued)

B-282

SAN DIEGO COUNTY (Continued)

Merrill, H. Ross	3251 4th Avenue	San Diego 3
Merwin, Thomas Keery	3318 4th Avenue	San Diego
Ravin, Oscar G.	233 A Street, Suite 405	San Diego
Root, A. B.	1006 Medico Dental Building	San Diego 1
Rowland, Alan L.	Bank of America Building	San Diego 1

SAN FRANCISCO COUNTY

Aiken, Samuel D.	384 Post Street	San Francisco 8
Barkan, Otto	490 Post Street	San Francisco 2
Bettman, Jerome W.	2400 Clay Street	San Francisco 15
Blak, Einar V.	1801 Bush Street	San Francisco 9
Borley, William E.	655 Sutter Street	San Francisco 2
Boyle, S. F.	490 Post Street	San Francisco 2
Brinckerhoff, Albert J.	490 Post Street	San Francisco 2
Campion, George S.	490 Post Street	San Francisco 2
Carman, Henry F.	60 Vicente Street	San Francisco 16
Dickey, Clifford Allen	450 Sutter Street	San Francisco 8
Edgerton, Ambrose Earl	450 Sutter Street	San Francisco 8
Eissler, Rolf	2107 Van Ness Avenue	San Francisco 9
Fine, Max	655 Sutter Street	San Francisco 2
Hall, Thomas G.	516 Sutter Street	San Francisco 2
Harrington, David O.	384 Post Street	San Francisco 8
Harrington, John T.	450 Sutter Street	San Francisco 8
Hicks, Avery	490 Post Street	San Francisco 2
Hogan, Michael J.	450 Sutter Street	San Francisco 8
Hosford, George N.	450 Sutter Street	San Francisco 8
Jakobovits, Rafael	655 Sutter Street	San Francisco 2
Kadesky, David	1801 Bush Street	San Francisco 9
Lachman, George S.	450 Sutter Street	San Francisco 8
McBain, Earle H.	490 Post Street	San Francisco 2
Miller, Miriam	350 Post Street	San Francisco 8
Mohr, Selby	450 Sutter Street	San Francisco 8
Pischel, Dohrmann K.	490 Post Street	San Francisco 2
Rodin, Frank H.	490 Post Street	San Francisco 2
Rodin, Max	490 Post Street	San Francisco 2
Sarrail, Jean A.	30 Hernandez Avenue	San Francisco 16
Shaffer, Robert N.	490 Post Street	San Francisco 2
Smith, Joseph G.	450 Sutter Street, Room 1918	San Francisco 8
Tesauro, Nicholas	384 Post Street, Room 901	San Francisco

(Section Continued on Next Page)

B-512 ELIGIBILITY OF PUBLIC INSTITUTION INMATES

B-512

An inmate of a public institution may apply for aid. If otherwise eligible, aid shall be granted from the first of the month in which the determination is made that he is eligible, provided the applicant has a bona fide plan to move from the institution following receipt of the first payment. Likewise, aid shall be granted to an eligible applicant who became an inmate of a public institution after the application was signed.

Not more than one warrant may be delivered to the applicant at the public institution. The applicant must move from the institution as soon as possible after receiving his first warrant. Should the applicant remain in the institution after the last day of the month for which the initial warrant is paid, he is ineligible for the warrant for the next month and for each succeeding month up to the month following that in which he leaves the institution.

Example: An inmate of a public institution signed an application on October 8. The applicant planned to leave the institution in November. Aid is granted on November 26, effective November 1, and the November warrant is delivered to the applicant at the institution on November 29. The applicant moves from the institution on December 4. The warrant for December is canceled because the applicant did not leave the institution until after November 30. Aid is paid effective January 1 if the applicant remains otherwise eligible.

An inmate of a federal hospital or home located in this state, and which is not supported in whole or in part by the state or any of its political subdivisions, may apply for and receive aid while an inmate. (AGO NS572)

A person confined in a public institution of a custodial or correctional character is not eligible to receive aid, and aid shall be discontinued as of the last day of the month in which a recipient enters such institution. If aid is restored following discontinuance because of confinement in a public hospital or in a public institution of a custodial or correctional character, aid may be restored for the balance of the month during which he was not confined in such institution, provided he is otherwise eligible. (See Sec. B-515, Eligibility During Hospitalization; for ANB, see Sec. B-518, Institutional Subvention for Hospital or Infirmary Care.)

Certification of Payment after Release of Inmate from County Institution

As evidence that an applicant whose application was granted while an inmate of a public institution and who received his first warrant while in the institution, ceased to be an inmate following receipt of that warrant, a Certificate of Delivery of Payment of Aid, Form AB 231, relating to the warrant for the second month shall be completed and filed in the case record. The county official or other person delivering the warrant certifies on AB 231 to the day the applicant left the institution and the date the warrant was delivered.

(Section Continued on Next Page)

B-503 INSTITUTIONS--GENERAL

B-503

The Aid to the Blind Program has been established primarily to provide care for a person in his own home, as the preservation of satisfactory home and family life is one of the major goals of a welfare program. Aid shall be granted to a person in his own or some other suitable home of his own choosing, in preference to placing him in an institution. Institutional care, however, may sometimes be necessary. Some physical and mental illnesses may be cared for best in institutions. When constant care is required, few homes can adequately meet the need. The right of a person to make his own living arrangements includes his right to live in a boarding home or private institution of his own choice.

Eligibility is not dependent upon the licensing or approval of the boarding home or private institution in which an applicant or recipient is living. (W&IC 3044.5, 3075, 3460)

B-506 INSTITUTIONS--DEFINITIONS

B-506

The term "public institution" may be considered as including a place of residence which affords shelter or care to two or more persons, and is managed in whole or in part by or through any public instrumentality, official, or employee acting in an official capacity; or a place of residence, which, by reason of the circumstances of its origin and charter or maintenance from public funds, may properly be termed a public institution; or a place of residence in which collective shelter or care at a single or lump sum contract price is afforded to two or more persons by agreement with the state or any of its political subdivisions for a consideration of money or money's worth.

A county institution is one established and maintained by a county for the purpose of rendering medical or surgical care to the sick or wounded or where the infirm are given shelter and maintenance. County institution includes a private hospital which, pursuant to contract with the county accepts patients for medical, hospital, or infirmary care at county expense.

A private institution is defined as a facility managed and controlled by an association or corporation or by an individual for the purpose of giving shelter and/or care to groups of people, and which is not supported from public funds. A private institution may be either commercial non-profit, fraternal or benevolent. (W&IC 3044.1, 3075, 3460)

B-509 RESIDENTS OF CERTAIN INSTITUTIONS NOT CONSIDERED INMATES

B-509

Blind persons shall not be considered inmates of public institutions for purposes of aid if attending any of the following:

1. A shop for the blind maintained by the state which does not provide board and room to blind employees.
2. Public high schools, University of California, and any other institutions of higher learning in the state.
3. State Orientation Centers for the Blind insofar as resident trainees are concerned.
4. The California School for the Blind. (W&IC 3044, 3075, 3444, 3460)

B-540 (Continued)

B-540

Example 1: An ANB recipient has exempt income from earnings of \$40 a month. In addition, he has income from a life insurance policy of \$10 a month. Discussion with the recipient reveals that he has a special need for a telephone in the amount of \$4.00 a month. The recipient receives a grant of \$79.

Example 2: An ANB applicant (not eligible for APSB because of residence) has earned income of \$80 a month. In addition he receives \$20 a month from a son. Discussion with the applicant reveals he has special needs for housekeeping service and a telephone which totals \$50 a month. Since \$50 of the earned income is exempt from all consideration, the applicant actually has \$50 (\$30 plus \$20 from the son) non-exempt income with which to meet his needs. Therefore, special need of \$50 is established and the applicant is eligible to the maximum grant of \$85.

Example 3: An ANB recipient (not eligible for APSB because of residence) has earned income of \$80 a month, and in addition, receives \$20 a month from a son. Discussion with the recipient reveals he has special needs for medical and housekeeping services which total \$70 a month. Since \$50 of the earned income is exempt from all consideration, the recipient actually has \$50 (\$30 plus \$20 from the son) of non-exempt income with which to meet his needs partly. While special needs of \$70 are established, there is only \$50 of non-exempt income to be applied toward meeting these special needs, leaving an unmet need of \$20. The recipient receives the maximum grant of \$85.

Example 4: A married ANB recipient (ineligible for APSB because of residence) has net income from earnings in the amount of \$110 a month. His wife has no income and her need has been determined to be \$80 a month. As \$50 of the recipient's income from earnings is exempt to the recipient, he may allocate a like amount, or \$50, to the support of his spouse (see Sec. B-538) thus leaving \$10 as non-exempt income to the recipient. The recipient is entitled to a grant of \$75 (\$85 minus \$10 non-exempt income), if he has no special needs.

If in the same example the recipient's income from earnings were \$87 a month, the first \$50 would be considered exempt to him, and the spouse would be allocated \$37 toward her support.

The case record shall show the method used in determining the amount of net income exempt from consideration in computing the amount of aid. (W&IC 3075, 3084.3)

B-542 EXEMPT INCOME IN APSB

B-542

The annual net income of a recipient of APSB from all sources (except that from general relief which is granted for any part of the period covered by the first APSB warrant) of a combined total value not exceeding \$1,000, increased by one-half of that part of his annual net income which is in excess of \$1,000, shall be considered exempt income in determining the amount of aid. Net income shall be determined by deducting from the gross income the expenses which are incident to its receipt.

(Section Continued on Next Page)

B-538 (Continued)

B-538

Net income from real and personal community property shall be shared equally with the spouse whether eligible or ineligible.

If the recipient has separate income from any source, the total amount of such net income must be applied toward his own need and no portion may be allocated to the spouse whether eligible or ineligible.

If an ineligible spouse has separate income from any source no portion of such income may be arbitrarily considered as income to the recipient. The extent to which the applicant or recipient is actually in receipt of assistance from such spouse, either in cash or in kind, shall be determined on the basis of the contribution actually received. The pecuniary ability of the ineligible spouse whose income is his or her separate income, is determined in the same manner as the pecuniary ability of other responsible relatives as outlined in Sec. B-532. (See Sec. B-532 for definition of separate income.)

If a recipient is receiving OASI benefits, the apportionment to the spouse shall not continue after the spouse has reached the age of 65 and becomes eligible for OASI payments. However, if the spouse files a claim for OASI benefits immediately when eligible to do so, apportionment may continue until the spouse receives an award. If the spouse refuses to file a claim, apportionment shall not continue after the month in which the 65th birthday is reached. If the spouse does not qualify for benefits, the apportionment may continue up to one-half of the amount received even though such benefits are the separate income of the person to whom they are paid.

If a serviceman's allowance is received by either of a couple, the ineligible spouse (unless otherwise stipulated by the serviceman) may be allotted as much thereof as is necessary for his own support, and the support of his dependent children. (AGO NS5164, 5187; W&IC 3003, 3075, 3084, 3402, 3460, 3472)

B-540 EXEMPT INCOME IN ANB

B-540

The net monthly earned income, not exceeding \$50.00, of an applicant for or recipient of ANB shall not be considered in determining the amount of aid.

Earned income is that which is received as a result of the efforts of the applicant or recipient, i.e., remuneration for employment, self-employment or otherwise, including the cash value of all remuneration paid in any media other than cash.

Net earned income is that amount which remains after obligatory and mandatory deductions have been made and after allowance has been made for the other expenses incurred incident to the securing and retention of the earned income.

Returns from personal or real property holdings, such as the net income from rental of rooms, from purveying of board and room, from crops or livestock, etc., shall not be considered earned income unless such returns result from an appreciable and continuous effort on the part of the applicant or recipient.

All income other than earned net income, and earned net income in excess of \$50.00, shall be considered in determining the amount of aid. (See Sec. B-538, Division of Income with Spouse)

(Section Continued on Next Page)

B-544 (Continued)

B-544

A. FREE RENT

If an applicant or recipient is in receipt of free rent, the value placed thereon shall not be less than \$5 nor more than \$15. Within these minimum and maximum amounts, the value placed upon the shelter furnished without cost to the individual shall be determined by taking into consideration both of the following factors:

1. Comparable rental costs in the community. In no instance shall value placed upon free rent furnished an applicant or recipient exceed the rental charged for comparable shelter in the same community, except that the minimum amount set in the standard may not be reduced.
2. Adequacy of housing. The following definitions of sub-standard, intermediate, and standard housing shall be used to determine the degree of adequacy of the housing provided an applicant or recipient:
 - a. Sub-standard housing--a dwelling or a room which does not have adequate sanitary facilities, safety provisions, or any of the other factors mentioned below.
 - b. Intermediate housing--a dwelling or a room which does not have adequate provisions for privacy and comfort, but where there are adequate sanitary facilities and safety provisions.
 - c. Standard housing--a dwelling or a room which meets minimum standards of health, safety and decency, including such items as adequate privacy, sanitary facilities, and comfort.

In making the determination of the value to be placed on free housing, based upon a combination of the factors of comparable rental costs and adequacy of housing, one of three monetary amounts shall be used: the minimum amount set forth in the standard (\$5); the intermediate amount in the standard (\$10); or the maximum amount set forth in the standard (\$15).

If an applicant or recipient is residing in a makeshift shelter such as a dugout, cave, or tent, it is a "makeshift shelter." The value placed on free rent in such "makeshift shelter" shall not exceed \$3 a month.

The basis for the determination of the value placed on free rent shall be recorded in the case record.

(Section Continued on Next Page)

B-542 (Continued)

B-542

If an application for APSB has been approved, the recipient shall be entitled to receive the maximum amount of aid each month, and retain net income up to \$1,000 within any one yearly income period. If a person has net income of more than \$1,000 in a given yearly period, an amount equal to one-half of that part of his monthly income which is in excess of \$1,000 is deductible from the maximum grant until the end of the yearly income period. (See Sec. B-542, Adjustment in Amount of Aid.)

If the recipient is making an allocation to his spouse, no adjustment shall be made until the support of the spouse has been met, but in no event shall the amount allocated to the support of the spouse exceed \$1,000 in a given yearly period. Such allocation shall not be made until the recipient has had his full maximum of \$1,000 exempt income. (See Sec. B-538, Division of Income with Spouse.)

An applicant (including original application, restoration, annual redetermination, transfer from ANB, and reapplication) for APSB who has a regular monthly net income, in excess of \$168.33 is ineligible to APSB even though he has a spouse without other means of support.

An educational scholarship, which has been awarded to a recipient of APSB while he is regularly attending any public school in this state or any institution of higher learning in this state, shall not be deemed property, income, or resource for any purpose, and no deduction shall be made from the recipient's amount of aid because of such scholarship. (W&IC 3400, 3447, 3460, 3472)

B-544 VALUE OF CONTRIBUTIONS IN KIND

B-544

The value placed upon rent, utilities, food, or other items of support contributed in kind to an applicant or recipient shall not be in excess of an amount which will permit him to meet his other needs, such as incidentals, transportation, etc.

The following factors shall determine the monetary value of shelter and utilities and room and board for which the applicant or recipient is not required to pay because they are furnished by relatives, employers, or others:

(Section Continued on Next Page)

B-703 (Continued)

B-703

visit may be waived if there are not reasonably adequate public transportation facilities to the home. An interview shall be held elsewhere. The case record shall set forth the conditions which made a home visit impossible.

To insure the completion of the determination of eligibility prior to the effective date of the transfer, application should be taken by the second county well before the date aid is to be discontinued by the first county. If an application has not been taken by the second county within the one year period, it should be taken immediately thereafter. For a regular recipient, aid shall be paid by the second county as of the first day of the month following the completion of one year of residence, unless the date of one year of residence starts on the first day of the month, in which event aid shall begin as of that date irrespective of the date of application or date of action by the county. (See Sec. B-706 - Removal of Non-County Aid Recipients)

The presumption is that residence in the second county starts upon the date of removal from the first county. If, therefore, it appears that a lapse of time occurred between the date of removal from the first county and the establishment of residence in the second county, the second county shall obtain residence evidence which will either support or refute the presumption that the period of time for the acquisition of required residence started upon the date of removal from the first county. Form AB 216 (or Form AB 204, if used), shall contain an adequate explanation of any lapse between date of removal and date of establishing residence in the second county. In completing Section B of Form AB 215, the second county shall take into consideration the effect of the change in living conditions or other changes which might affect the amount of aid.

The second county shall complete Section B of Form AB 215, retain one copy, and return two copies to the first county together with Form AB 216 (or Form AB 204, if used), properly completed and attested, and such supplementary report as is necessary.

D. Submission of Documents

Upon receipt of Form AB 215 and Form AB 216 (Form AB 204 if payment of non-county aid is involved) the first county shall complete and sign Section C of Form AB 215. One copy shall be retained and one shall be sent to the second county.

The first county shall provide the second county with copies of:

1. Application, Form BI 200.
2. Certificate of Verification of Eligibility, Form BI 201.
3. Information concerning real and personal property holdings.

(Section Continued on Next Page)

B-703 TRANSFER OF AID PROCEDURES

B-703

For a regular recipient, county participation begins as of the first of the month following the completion of one year's residence in the second county, unless the date of completion falls on the first of the month, in which case participation begins as of that date. For regular recipients, county responsibility is not dependent upon whether blindness occurred while they were residents in or outside the state.

A. Inter-county Transfers

If the residence of a regular or a non-county recipient is established in another county in the state, inter-county transfer arrangements shall be initiated. There shall be no interruption or overlapping in receipt of aid occasioned by such change of residence.

The following procedure provides a method of notification between counties which will insure continued receipt of aid when residence has been changed from one county to another in this state. The counties involved hereinafter are designated as follows: first county--the county which is currently paying aid; second county--the county to which residence has been changed; third county--any subsequent county to which residence may be changed prior to completion of the required period of residence in the second county.

B. Action by First County

Notification of Transfer, Form AB 215, shall be prepared in quadruplicate by the first county, Section A being completed in full. One copy shall be retained and three copies shall be sent to the second county as soon as administratively possible after the first county learns of the recipient's removal to the second county. The first county shall supply the second county with any pertinent information other than that shown in Section A of Form AB 215 and request any specific information desired. In all transfer cases, the first county shall advise the second county of the recipient's residence status in the first county; i.e., regular recipient or non-county recipient. If non-county, the date residence was established in the first county shall be shown.

The first county shall send Notification of Change of County Residence, Form AB 217, to the recipient at the time Section A of Form AB 215 is completed. The notification informs the person of future county procedure and of his own responsibilities if delay or interruption of aid is to be avoided.

C. Action by Second County

Upon receipt of the Form AB 215, the second county shall make a home call to verify the presence of the recipient in the county, and to secure the completed recipient's Affidavit of Residence, Form AB 216. (If non-county aid is to be granted by the second county Form AB 204, Applicant's Affidavit of Intent as to Residence, shall be secured in place of AB 216, to substantiate the date residence was established in the second county.) Exception: The requirement of a home

(Section Continued on Next Page)

B-703 (Continued)

H. Removal from Second County

1. After completion of new residence: If residence in another county is established subsequent to the date one year of residence in the second county was acquired, the second county shall be responsible for payment of aid until the end of the month following completion of one year's absence therefrom, except that when the change of residence took place on the first day of the month, responsibility of the second county ceases one year from that date.
2. Prior to completion of new residence: Should a regular recipient having residence in a second county establish residence in a third county before completing one year of residence in the second county, the second county has no responsibility for payment of aid. The first county continues to be responsible for the payment of aid on a participating basis until the end of the month following completion of a one-year period from the date residence in the second county was established, (unless the change of residence took place on the first day of the month). The first county shall notify the third county of the change in county residence and request the second county to forward to the third county such copies of documents as were furnished the second county by the first county at the time transfer arrangements were made with the second county. Transfer arrangements shall be entered into with the third county and wherever possible the third county shall grant aid on a non-county basis, effective the first of the month following completion of one year's residence outside the first county. (If non-county aid is to be granted by the third county, Form AB 204, shall be secured in place of AB 216, to substantiate date residence was established in the third county and the date residence was established outside the first county.)

If it is administratively impossible for the third county to secure an application and grant aid effective the first of the month following completion of one year's residence outside the first county, the first county shall continue aid and arrange with the third county a discontinuance date which will permit continuous payment of aid. In no event may the first county continue non-county aid beyond the first of the month following the date on which the recipient has acquired one year's residence in the third county. (Six months in case of a recipient who became blind while a California resident.)

(Section Continued on Next Page)

B-703 (Continued)

B-703

4. Verification of the required state residence.
5. Letters of Guardianship or Summary of Letters of Guardianship, Form DPA 5.
6. Report of Eye Examination, Form BL 227 or 227A.
7. Current information concerning pecuniary ability of responsible relatives. (Form BL225, if used)

E. Notification to Recipient

In all transfer cases, Notice of Effective Date of Transfer, Form AB 218, shall be sent to the recipient. If a regular recipient is being transferred from the first county to the second county, the notification shall be sent not later than three months prior to the effective date of the transfer. In non-county aid transfer, the notification shall be sent immediately upon completion of the transfer arrangements.

F. Application, Etc., Obtained by Second County

The second county shall complete the Certificate of Verification of Eligibility, Form BL 201, in the same manner as for any new application and forward it to the SDSW. In transferring responsibility for payment of aid from one county to another, an application in the second county is not legally required. However, in order that financial documents in the second county will be complete, the securing of an application by the second county is recommended. The date of signature on the application in the second county is not pertinent and in no way affects the beginning date of aid in the second county.

G. Responsibility for Payment of Aid

If the responsibility for payment of aid is transferred from one county to another, the beginning date of aid in the second county may antedate the signing of the application in the second county. There shall be no interruption in aid because the application has not been signed prior to the date on which the second county is responsible for payment.

When a dispute arises between two counties regarding the beginning date of residence in a transfer case, the SDSW shall exercise full authority in weighing the evidence presented. See Sec. B-382, Dispute on Responsibility for Payment of Aid.

(Section Continued on Next Page)

State of California
 Aid to the Blind
 Status ☐ New Application
 ☐ Reinvestigation
 ☐ Reapplication

Department of Social Welfare
 State No. _____
 County _____
 District _____
 Former State Number _____
 If a Transfer _____

PHYSICIAN'S REPORT OF EYE EXAMINATION
THIS REPORT, TO BE VALID, MUST BE COMPLETELY FILLED OUT

SUBMIT IN DUPLICATE

1. APPLICANT'S NAME _____ 2. Sex _____ 3. Race _____
 4. Address _____
 5. Date of birth _____ 6. Age at onset of impaired vision: Right eye _____ Left eye _____
 7. Residence at onset of impaired vision: Right eye _____ Left eye _____
 8. Eye pathology primarily responsible for impaired vision
 Right eye: _____
 Left eye: _____
 9. Secondary pathological conditions, if any
 Right eye: _____
 Left eye: _____
 10. Etiological factor responsible for primary eye pathology
 Right eye: _____
 Left eye: _____
 11. If there is a history of eye injury or operation, state type and date
 Right eye: _____
 Left eye: _____
 12. Describe briefly all pathological eye findings
 Right eye: _____
 Cornea
 Iris
 Pupil
 Lens
 Vitreous
 Retina and choroid
 Optic Nerve
 Left eye: _____
 Cornea
 Iris
 Pupil
 Lens
 Vitreous
 Retina and choroid
 Optic Nerve
 13. CENTRAL VISUAL ACUITY--Use Snellen notations in recording visions as 20/200, 10/200, etc. If applicant is unable to read the "200-foot" letter on the Snellen Chart at a distance of 20 feet, he should approach the chart until he can read it. Report the visual acuity as 3/200, or 6/200, etc., with the numerator indicating the distance at which he reads, and the denominator indicating the standard letter he is able to read. If applicant is unable to read the largest letter on the Snellen Chart from any distance, but can see hand movements, report "Hand Movements" (H.M.) at the determined distance. If he is unable to see "Hand Movements" report "Light Perception" (L.P.) or "No Light Perception" (No L.P.).
 Make definite statements if possible. Symbols such as a check (✓), (0), (X), or terms such as "nil," "none," "blind," "objects," "fingers," "00/200" must not be used. Use AMA or Jaeger reading card in determining near vision.

Distance (20 feet)	Near (14 inches)	Distance (20 feet)	Near (14 inches)
WITHOUT GLASSES			
Right eye (13a) _____	(13b) _____	Left eye (13c) _____	(13d) _____
WITH PRESENT GLASSES			
Right eye (13e) _____	(13f) _____	Left eye (13g) _____	(13h) _____
WITH BEST POSSIBLE CORRECTION			
Right eye (13i) _____	(13j) _____	Left eye (13k) _____	(13l) _____

REFRACTION RECORD--To be recorded in all cases where refraction improves visual acuity to better than 20/200.
 Sphere Cylinder Axis = Visual Acuity
 Right eye _____
 Left eye _____

Form BL 227 (revised)--December, 1951

(SEE REVERSE OF THIS FORM)

NOTE: If you are a married daughter and are not separated from your spouse, report only the amount of your SEPARATE INCOME, if any. If you have no separate income, complete Section 6 "Contribution to Applicant." Indicate "None" in answer to Section 4 "Monthly Income."

4. MONTHLY INCOME

What is your total monthly salary or earnings? \$ _____

What income do you receive from—

Stocks and bonds? _____
Net rentals? _____
Pensions or compensation? _____
Other income? (Specify) _____

TOTAL MONTHLY INCOME FROM ALL SOURCES \$ _____

5. MONTHLY EXPENSES

Rent or monthly payment on home \$ _____

Property taxes or assessments (monthly prorata) _____

Income taxes (monthly prorata) _____

Required monthly deductions from salary (Social Security, unemployment, etc.) _____

Utilities (average) _____

Food (average) _____

Insurance (monthly prorata of all premium payments) _____

Clothing and incidentals _____

Installment payments (mortgages or personal loans, medical or dental bills or other obligations—monthly prorata) _____

Other unusual expenses (explain) _____

Contributions to dependents other than those living in your household—

Name	Age	Relationship	
_____	_____	_____	\$ _____
_____	_____	_____	_____
_____	_____	_____	_____

TOTAL MONTHLY EXPENSES \$ _____

6. CONTRIBUTION TO APPLICANT

I am at present contributing to this applicant each month and will continue this contribution until further notice to the County Welfare Department. (Check the type of assistance given.) If contribution is in kind, estimate its cash value. If no contribution, write "none."

- ☐ Cash in the amount of \$ _____
☐ Free rent (estimated value) _____
☐ Free board (estimated value) _____
☐ Free room and board (estimated value) _____
☐ Other (specify) _____

I will, from this date, contribute—

- ☐ Cash in the amount of \$ _____
☐ Free rent (estimated value) _____
☐ Free board (estimated value) _____
☐ Free room and board (estimated value) _____
☐ Other (specify) _____

If change in contribution is indicated, state reason therefor _____

I certify that the above statements are true and correct.

[Signature of
Responsible Relative] _____

Date _____

State of California
Aid to the Blind
Status ☐ New Application
☐ Reinvestigation
☐ Reapplication

Department of Social Welfare

State No. _____
County _____
District _____
Former State Number _____
If a Transfer _____

OPTOMETRIST'S REPORT OF EYE EXAMINATION
THIS REPORT, TO BE VALID, MUST BE COMPLETELY FILLED OUT
SUBMIT IN DUPLICATE

1. APPLICANT'S NAME _____ 2. Sex _____ 3. Race _____

4. Address _____

5. Date of birth _____ 6. Age at onset of impaired vision: Right eye _____ Left eye _____

7. Residence at onset of impaired vision: Right eye _____ Left eye _____

8. If there is a history of eye injury or operation, state type and date

Right eye:

Left eye:

9. Describe briefly all media of the eye

Right eye:

Cornea

Iris

Pupil

Lens

Vitreous

Retina and choroid

Optic nerve

Left eye:

Cornea

Iris

Pupil

Lens

Vitreous

Retina and choroid

Optic nerve

10. CENTRAL VISUAL ACUITY--Use Snellen notations in recording visions as 20/200, 10/200, etc. If applicant is unable to read the "200-foot" letter on the Snellen Chart at a distance of 20 feet, he should approach the chart until he can read it. Report the visual acuity as 3/200, or 6/200, etc., with the numerator indicating the distance at which he reads, and the denominator indicating the standard letter he is able to read.

If applicant is unable to read the largest letter on the Snellen Chart from any distance, but can see hand movements, report "Hand Movements" (H.M.) at the determined distance.

If he is unable to see "Hand Movements" report "Light Perception" (L.P.) or "No Light Perception" (No L.P.).

Make definite statements if possible. Symbols such as a check (✓), (O), (X), or terms such as "nil," "none," "blind," "objects," "fingers," "00/200" must not be used. Use AMA or Jaeger reading card in determining near vision.

	Distance (20 feet)	Near (14 inches)		Distance (20 feet)	Near (14 inches)
WITHOUT GLASSES					
Right eye (10a)	_____	(10b) _____	Left eye (10c)	_____	(10d) _____
WITH PRESENT GLASSES					
Right eye (10e)	_____	(10f) _____	Left eye (10g)	_____	(10h) _____
WITH BEST POSSIBLE CORRECTION					
Right eye (10i)	_____	(10j) _____	Left eye (10k)	_____	(10l) _____

REFRACTION RECORD--To be recorded in all cases where refraction improves visual acuity to better than 20/200.

	Sphere	Cylinder	Axis	Visual Acuity
Right eye				
Left eye				

RECORD OF VISUAL FIELDS

14. PERIPHERAL VISION--MUST be recorded in all cases where central vision with or without best possible correction is greater than 20/200. Peripheral fields must be charted using a 6 mm test object at a distance of 13 inches.

(Record of Visual Fields cannot be reproduced on this sheet - see actual form)

15. Prognosis (Is there any likelihood that vision could be restored by operation or treatment?) _____

16. Recommendations _____

17. In all cases where surgery is recommended, the following reports are required:

a. Macular function (2 point light test - the minimum distance of separation at which two points of light can be recognized) _____

b. Light projection fields (chart light projection field under Item No. 14 above). _____

Remarks:

I Certify, That on the _____ day of _____, 19____, I examined the person named in this report; and that this is a true and accurate description of the condition of his eyes and of the degree of impairment of vision.

Address of Physician

Signature of Physician

THIS SECTION NOT TO BE COMPLETED BY EXAMINING PHYSICIAN

I Certify, That I have reviewed this report and find that the facts therein show this person

☐

ELIGIBLE:

☐

Requires re-examination at time of annual reinvestigation.

☐

Does not require re-examination. (See Man. Sec. B-255)

☐

INELIGIBLE: (See Man. Sec. B-243 or B-259)

☐

OTHER: _____

Date of Review

Signature of State Ophthalmologist

State of California

Department of Social Welfare

AUTHORIZATION FOR FINANCIAL INVESTIGATION

County No. _____

Name of County Worker

I, _____

residing at _____ California,
Street Number City

hereby authorize release to the bearer, a representative of the County Welfare Department of _____ County, any and all information regarding deposits, withdrawals and balances pertaining to any bank, postal savings, building and loan or trust accounts, which I, or my spouse either separately or jointly now have or may have had in the past. I also authorize release of information regarding any collateral held as security for loans advanced to me or my spouse or of the existence of a safe deposit box, or any stocks and bonds that I, or my spouse either separately or jointly own or have owned in the past.

I further authorize the bearer to be given information regarding any insurance that I have or may have had, or any insurance that my spouse has or may have had with any insurance company, fraternal organization, union, or benefit society. Authorization is also given for release of information available from the records of the Bureau of Old Age and Survivor's Insurance and from the records of the Department of Employment regarding Unemployment Benefits.

(SIGNED) _____
Signature of applicant

Birthplace _____

Birthdate _____

Maiden name of mother _____

(SIGNATURE OR
NAME OF SPOUSE) _____

Birthplace of spouse _____

Birthdate of spouse _____

Maiden name of spouse's mother _____

Date _____ 19 _____

Form AB 228, Revised July 1948

RECORD OF VISUAL FIELDS

11. PERIPHERAL VISION--MUST be recorded in all cases where central vision with or without best possible correction is greater than 20/200. Peripheral fields must be charted using a 6 mm test object at a distance of 13 inches.

(Record of Visual Fields cannot be reproduced on this sheet - see actual form)

12. Should applicant be referred for any other type of examination? _____

13. Recommendations _____

14. In all cases where referral for treatment is recommended the following reports are required:

a. Macular function (2 point light test - the minimum distance of separation at which two points of light can be recognized)

b. Light projection fields (chart light projection field under Item No. 11 above).

Remarks:

I Certify, That on the _____ day of _____ 19____, I examined the person named in this report; and that this is a true and accurate description of the condition of his eyes and of the degree of impairment of vision.

Address of Optometrist

Signature of Optometrist

THIS SECTION NOT TO BE COMPLETED BY EXAMINING OPTOMETRIST

I Certify, That I have reviewed this report and find that the facts therein show this person

☐ ELIGIBLE:

☐ Requires re-examination at time of annual reinvestigation.

☐ Does not require re-examination. (See Man. Sec. B-255)

☐ INELIGIBLE: (See Man. Sec. B-243 or B-259)

☐ OTHER: _____

Date of Review

Signature of State Ophthalmologist

Certified as a Regulation (as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

Charles L. Schottland
(Signature)

Director
(Title)

3-31-52
(Date)

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

March 31, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Aid to Needy Children Manual Letter No. 16.

These regulations were adopted by the State Social Welfare Board on March 21, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

~~ENDORSED~~
FILED

In the Office of the Secretary of State
of the State of California

MAR 31 1952

At 3:05 o'clock P.M.

FRANK M. JORDAN, Secretary of State
By CHAS. J. HAGERTY
Assistant Secretary of State

CHARLES I. SCHOTTLAND
Director

EARL WARREN
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

March 28, 1952

PAID

MAR 31 1952

FRANK M. JORDAN, Secretary of State

By *R. G. Manning*

AID TO NEEDY CHILDREN MANUAL LETTER NO. 16

The attached revision numbered 166 is to be entered in your copy of the Manual of Policies and Procedures - Aid to Needy Children and the revision number canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on March 21, 1952, to be effective May 1, 1952.

New Sec. C-201 sets forth an important policy governing prompt processing of new applications, including the final step of making payment to eligible applicants. The general statement regarding prompt county action has been deleted from Sec. C-100.

FILED

in the Office of the Secretary of State
of the State of California

MAR 31 1952

At _____ o'clock _____ M.

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

C-110 RIGHT TO MAKE APPLICATION**C-110**

The provisions of the ANC Law define the eligibility requirements. All persons acting on behalf of children, including unborn children, who believe the children meet these requirements have a right to apply for the benefits. The county shall accept the application even though the children appear to be ineligible, unless the applicant does not desire to continue with the application. (See Sec. C-130, When Application is to be Taken.)

Persons acting on behalf of blind children 16 years of age or over have the right to choose the type of assistance for which they will apply. (W&IC 1560)

C-115 PERSON MAKING APPLICATION**C-115**

If a child is living with a parent or a relative, either the parent or the relative shall sign the application. If a child is in a boarding home or institution, the application preferably should be signed by the parent, the guardian, or

(Section Continued on Next Page)

C-100 COUNTY RESPONSIBILITY IN THE APPLICATION PROCESS

C-100

The county's responsibility in the application process is to receive requests and applications, and requests for restoration, to assist applicants in securing evidence of eligibility, to determine eligibility or ineligibility, to authorize and assure issuance of payments to eligible persons, to provide information as to availability of services by other agencies, and to provide such other services as the individual may require and the county may be able to render. (See Sec. C-201, Prompt Determination of Eligibility) (W&IC 1550, 1560)

C-105 REQUESTS FOR ASSISTANCE

C-105

A written record of all requests for assistance shall be kept, even though an application form is not signed.

"Requests for assistance" and "Requests for restoration of assistance" may be made orally (in person or by telephone) or in writing.

REQUEST FOR ASSISTANCE

A request for assistance is made when an individual acting in behalf of a child indicates that the child is in need and asks for financial assistance. If he lacks sufficient information to specify ANC as the assistance program for which he might qualify, the county shall provide the necessary information.

REQUEST FOR RESTORATION OF ASSISTANCE

A request for restoration of assistance is made when the individual acting in behalf of a child indicates that the child is in need and that the child had previously received assistance (in the county to which the individual is making his request) which had been discontinued less than twelve months prior to the date of the request for restoration.

REQUEST FOR INFORMATION

A request for information is one which is unrelated to a specific request for assistance. It is made without the individual indicating that a specific child is in need. He may only desire to obtain information relative to the assistance programs or points of agency policy. Such requests will usually be made by callers seeking information who are either (1) clearly not presumptive applicants, i.e., the general public, or (2) not willing to identify themselves. Note that a request for information may, in the course of an interview, develop into a request for assistance.

APPLICATION

A request for assistance is considered an application when the Application, Form CA 200, has been completed, signed by the applicant, and filed with the county. (W&IC 1557, 1560)

C-200 (Continued)

C-200

The determination of eligibility is a continuing responsibility. A child once found eligible may become ineligible due to unforeseen circumstances. A redetermination of eligibility shall be made whenever information indicates a possible change in circumstances or in need. There shall be a redetermination of eligibility at intervals not exceeding twelve months. Redetermination is necessary before assistance is restored for one child or for the entire family. Whenever a home visit is made or interview is held for a specific purpose, any possible changes affecting eligibility should always be covered.

The narrative shall contain the basis for the determination of continuing eligibility. In addition, the record shall contain an applicant's Affirmation of Eligibility, Form CA 206, completed by the applicant, parent, or person in loco parentis at intervals not exceeding twelve months.

The plans for the family shall be reviewed as often as indicated and at least when eligibility is redetermined. The narrative shall show concisely the progress made, the next steps to be taken, and any changes in the plans. The narrative shall also show what help the agency has provided in carrying out the plans.

The county shall inform the parent or payee of his continuing responsibility to keep the county promptly informed of any changes in the child's circumstances or change in need or financial condition, including any change in income or in real or personal property holdings.

The county shall inform the applicant of his right to appeal to the SDSW from any decision or action concerning the eligibility of the child, or any lack of action pertaining thereto. (Waic 1550)

C-200 DETERMINATION OF ELIGIBILITY - GENERAL

C-200

Effective administration of the ANC program depends upon a thorough and accurate determination of eligibility followed by periodic redetermination of continuing eligibility. Determination of eligibility is the process of gathering evidence of the circumstances of the child for whom application is made as related to the conditions of eligibility established for the program, the evaluation of the adequacy and competency of the evidence, and the arrival at a decision as to eligibility, continued eligibility, or ineligibility. It includes the accumulation and recording of evidence to substantiate the applicant's statement on the application that he believes the child to be eligible. On the basis of the evidence assembled by the applicant and the county, the county shall make the determination or decision as to eligibility or ineligibility.

The county shall explain to the applicant, or relative, what evidence is required for a determination of eligibility. The applicant has the primary responsibility for presenting evidence to substantiate his claim that the child is eligible. However, the county is responsible for offering and rendering service to the applicant in securing the required evidence, and the applicant shall not be required to establish the child's eligibility.

All reasonable sources of evidence shall be diligently examined, and all doubtful or conflicting evidence carefully evaluated, before assistance is denied. If ineligibility has been clearly established for one factor of eligibility by diligent examination of all reasonable sources of evidence and careful evaluation of doubtful or conflicting evidence, assistance shall be denied and determination of eligibility for other factors is unnecessary.

Since it is the county's responsibility to make an accurate determination of eligibility to assure that a child's needs are met and public funds are properly spent, the basis for the determination, that is, all evidence on which the determination is based, shall be fully recorded in the narrative or available copies of written evidence shall be filed in the record. This includes recording of the applicant's statement regarding the eligibility factors, as well as additional evidence if required. It also includes the evaluation of those statements or the other evidence and the reason further evidence is considered to be necessary (i.e., to clear up missing or conflicting data). Over-investigation of eligibility which is adequately established shall be avoided.

During the process of gathering evidence of the circumstances of the child, the county shall discuss with the family, immediate and long-term plans. This discussion shall include plans which will:

1. Enable the family to live as independently as possible by helping it develop resources to meet its financial needs so that public assistance will be required a minimum length of time.
2. Help the parents solve their own problems so that they are able to give the children proper care and attention.
3. Assist the family in using community resources.
4. Help the parents adjust to changes in their environment.
5. Help the remaining or well parent adjust to his or her added responsibility.

The concise and summary results of this discussion shall be recorded in the narrative.

(Section Continued on Next Page)

C-202 SOURCES OF EVIDENCE

C-202

The applicant shall be the primary source of evidence. Usually he will be able to state his circumstances and those of the child, as related to eligibility, in such a way that will leave no doubt as to eligibility. In those instances in which the applicant is unable to give definite, clear, and complete information which leaves no doubt, or in which evidence other than the applicant's statement is required, the applicant usually has or can secure additional evidence to substantiate his statements. Such evidence in the applicant's possession or which he is able to secure shall be used whenever available.

There will be occasions when the applicant will request the county or the county will offer, with the applicant's permission, to secure the additional evidence necessary for a determination, either from other individuals or organizations, or from public or private records.

Records of social agencies may contain additional evidence or information required to establish eligibility. Clearance with a confidential index or social service exchange should be made, if available, after identifying data has been obtained from the applicant and before the first interview with him, if possible, to enable the county to determine the social agencies to which the family may have been known. Social agencies frequently will assist in social planning for a family, upon proper request. The county shall utilize community resources for the best interest of the child and his family.

(Section Continued on Next Page)

C-201 PROMPT DETERMINATION OF ELIGIBILITY

C-201

There shall be the shortest possible lapse of time between the date the application is signed and the date the eligible child receives the assistance granted for him. In order to achieve this objective county procedure shall require that the determination of eligibility be initiated immediately following receipt of an application, and be continued with diligence and without unnecessary delay through and including the action of the board of supervisors, or their duly authorized representative. Accounting procedures shall also be so geared as to provide for prompt disbursement of assistance payments for eligible children.

The objective can be considered to be achieved if assistance is granted and paid for eligible children within 60 days from the date the application was signed; provided, however, that when all the evidence establishing eligibility has been secured in a lesser period of time, assistance shall be granted and paid promptly, without waiting for the expiration of the 60 day period. If, because of complicating factors requiring a longer period to complete the determination of eligibility, payment for any eligible child is delayed beyond 60 days after the application is signed, an explanation of the circumstances causing the delay shall be recorded in the narrative. Among the factors which might require a longer period of time to complete the determination of eligibility would be the necessity or awaiting reply for information from persons or agencies in another state or county, involved real or personal property situations, complications arising in the determination of continued absence of a parent from the home, etc. (W&IC 103.3; 1550, 1560)

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SAN FRANCISCO OFFICE
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948 MARKET STREET
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Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

March 31, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:
616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of the regulations issued by the State Department of Social Welfare with Aid to the Blind Manual Letter No. 9.

These regulations were adopted by the State Social Welfare Board on March 21, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.6 and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

FILED

in the Office of the Secretary of State
of the State of California

MAR 31 1952

At 3:05 o'clock P. M.

FRANK M. JORDAN, Secretary of State

By

Chas. J. Sayre
Assistant Secretary of State

Certified as a Regulation
as Regulations) of the

Dept of Social Welfare

(Name of State Agency)

Charles J. Schaaland

(Signature)

Director

(Title)

3-31-52

(Date)

CHARLES I. SCHOTTLAND
Director

EARL WARREN
Governor

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE in the Office of the Secretary of State
616 K STREET of the State of California
SACRAMENTO 14

March 28, 1952

MAR 31 1952

At _____ o'clock _____ M.

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

AID TO THE BLIND MANUAL LETTER NO. 9

The attached revision numbered 85 is to be entered in your copy of the Manual of Policies and Procedures - Aid to the Blind and the revision number canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on March 21, 1952, to be effective May 1, 1952.

New Sec. B-207 sets forth an important policy governing prompt processing of new applications, including the final step of making payment to eligible applicants. The general statement regarding prompt county action has been deleted from Sec. B-110.

The following department bulletins are obsolete:

371
388D
388D Supp.

B-105 (Continued)

B-105

An understanding of the conditions of eligibility and the information necessary to establish eligibility are essential to the applicant. This information shall be given to him, as nearly as possible, in terms adapted to the applicant's experience and understanding, and shall include a discussion as to:

1. The eligibility requirements of the aid which he is seeking. If he appears to have eligibility for another assistance program, then both shall be explained.

An applicant who is definitely ineligible for the categorical aid programs may be found eligible for other forms of aid granted by the county or by other public or private social agencies in the community.

2. The process of determining eligibility, such as the more common ways of gathering information, the interview, personal documents, etc., and the applicant's role in the process.
3. The confidential nature of records regarding not only the applicant but all persons related to the determination of eligibility.
4. The way in which the grant is computed.
5. The unrestricted right to use the grant given to him in any way he desires.
6. The right to a fair hearing.
7. The responsibility which the applicant has to inform the agency of any change in address or circumstances affecting his eligibility.

(W&IC 3075, 3460)

B-110 COUNTY RESPONSIBILITY IN THE APPLICATION PROCESS

B-110

The county's responsibility in the application process is to receive requests and applications, and requests for restoration, to assist applicants in securing evidence of eligibility, to determine eligibility or ineligibility, to authorize and assure issuance of payments to eligible blind persons, to provide information as to availability of services by other agencies, and to provide such other services as the individual may require and the county may be able to render. (W&IC 3026, 3081, 3082, 3421, 3470, 3472, 3473)

B-105 THE APPLICATION PROCESS

B-105

The provisions of the ANB and APSB Laws require that the essential facts of eligibility be determined. This process begins when the applicant makes his need for aid known to the county. It is completed with the decision as to his eligibility. The application is approved when the determination is completed and eligibility is definitely established. The application is denied at any point in the determination where ineligibility is definitely established.

The first step in the process is the application interview, the purpose of which is to determine if there is a sufficient presumption of eligibility to justify further determination. It is an especially important interview because the impression received by the applicant is carried over to future county relationships. The person may not know the kind of assistance he desires or the exact nature of the aid which he requests. This interview provides an opportunity for the mutual discussion of the applicant's needs and the type of assistance the county is equipped to render, under the laws, rules, and regulations within which it operates. These laws, rules, and regulations which place the agency in a position of advantage, may be bewildering to the applicant. These must be used in assisting him to exercise his right to claim assistance and to receive it if eligible. The interview is not something routine, nor is it something inflexible. On the contrary it is one which takes into consideration the fact that every individual is different. It is adjustable to the varying circumstances of each individual applicant and to his emotional attitudes.

In the case of a blind person, the application interview takes on added significance. This person comes to the agency for the assistance or service it may be able to render to him not always on the basis that his employment powers have been impaired because of age, nor on the basis that he is orphaned and has none to provide for him. He comes to the agency on the basis of a handicap--loss of sight--which has not only deprived him of the ordinary pleasures and opportunities available to most, but which has set him apart as an individual more exposed to the natural hazards of life than are other individuals.

An interview with a blind person requires great skill, tact, and understanding. Unable to see the person in front of him, he is more inclined to show greater sensitivity because of the inflection in the speaker's voice or the grip of his handshake, or the sound of a far-away movement. The speaker cannot depend on a smile to soften the effects of a harsh statement. Nods, shrugs, and gestures cannot take the place of words, and words and the tone of the voice are clues to the speaker's mood. The blind person needs the assurance that a sincere effort is being made to understand his problem and to render to him the service it is possible for the agency to render.

(Section Continued on Next Page)

B-206 (Continued)

B-206

It should be recognized that to some individuals, the act of applying for public assistance is an experience which may be distressing not only because it implies dependency, but because it exposes certain aspects of his life to public inquiry. This inquiry may have to him the added implication that little trust, if any, is placed upon the statements which he has made and to which he has attested under oath.

Under the section quoted above, the sworn statement of the applicant is acceptable evidence of the facts stated on the Application, Form Bl 200, and Affirmation of Eligibility, Form Bl 206, except with regard to blindness and residence, and further determination is not required unless, because of a discrepancy or conflicting information, there is reason to believe that further determination is necessary on one or more points of eligibility in any given case.

The applicant has the responsibility, in so far as he is able, to give information to assist the county in establishing eligibility. However, the county is responsible for offering and rendering service to the applicant in securing the required evidence, and the burden of proof that he is eligible shall not be imposed upon the applicant. Overinvestigation of eligibility which is adequately established shall be avoided. When one point of ineligibility has been clearly established, the investigation of other eligibility factors may cease. (W&IC 3081, 3082, 3470)

B-202 CONDUCT OF PERSONS ADMINISTERING AID

B-202

The public assistance worker administering aid shall conduct himself with courtesy, consideration and respect toward applicants and recipients. The worker shall endeavor at all times to perform his duties in such a manner as to secure for every blind person the maximum amount of aid to which he is entitled. He shall not attempt to elicit any unnecessary information or make any comment or criticism of any fact concerning an applicant or recipient which is not directly connected with aid to the blind. (W&IC 3082.1, 3460)

B-204 OATHS

B-204

The director, or person by whatever title designated, who acts as a director of a county agency carrying out the provisions of the aid to the blind programs may authorize his representative or representatives to take such affidavits and administer such oaths as are required for these programs. (W&IC 7.5)

B-206 THE ELIGIBILITY DETERMINATION PROCESS

B-206

In a democracy, the rights of a citizen are defined by law. Similarly, democratic principles of equity require that eligibility for benefits in a publicly supported program be also defined by law. California State laws, therefore, specify the eligibility requirements. All persons meeting the eligibility qualifications are equal before the law, and have a right to receive aid under a uniform application of the law. A determination of eligibility is designed to establish whether (a) the person is eligible to receive the aid for which he is applying; (b) he is ineligible for such aid; (c) he is no longer eligible to receive aid; (d) he is eligible to continue to receive aid. Determination of eligibility is the process of obtaining the pertinent evidence, evaluating the adequacy and competency of such evidence, and arriving at a decision.

It was perhaps the respect for the feelings and dignity of the individual that prompted the Legislature to make this declaration in law:

"The applicant's sworn statements in his application shall constitute prima facie evidence of the facts stated, except with respect to degree of blindness and residence. This section shall not be interpreted to preclude a full and complete investigation by the agency administering aid to the blind."

(Section Continued on Next Page)

B-208 SOURCES AND EVALUATION OF EVIDENCE

B-208

The applicant or recipient shall be the primary source of evidence except as to residence and degree of blindness. In those instances in which he is unable to give definite, clear, and complete information, he may have or be able to secure additional evidence to substantiate his statements. Such evidence shall be used whenever available.

There will be occasions when the individual will request the county or the county will offer, with his permission, to secure the additional evidence necessary for a determination, either from other individuals or organizations, or from public or private records. His written consent authorizing release of information from records other than those open to the public is required in most instances. He should understand the reason for such investigation.

Records of private and public social agencies, hospitals, clinics, schools, records of various county officers such as the recorder, assessor, etc., and the records of vital statistics department, etc., frequently contain information pertinent and necessary to establish eligibility.

(Section Continued on Next Page)

B-207 PROMPT COMPLETION OF INVESTIGATION

B-207

There shall be the shortest possible lapse of time between the date the application is signed and the date an eligible applicant receives the aid granted to him. In order to achieve this objective county procedure shall require that investigation be initiated immediately following receipt of an application, and be continued with diligence and without unnecessary delay through and including the action of the board of supervisors, or their duly authorized representative. Accounting procedure shall also be so geared as to provide for prompt disbursement of aid to persons eligible to receive it.

The objective can be considered to be achieved if aid is granted and paid to eligible applicants within 60 days from the date the application was signed; provided, however, that when all the evidence establishing eligibility has been secured in a lesser period of time, aid shall be granted and paid promptly, without waiting for the expiration of the 60 day period. If, because of complicating factors requiring a longer period to complete the investigation, payment to any eligible applicant is delayed beyond 60 days after the application is signed, an explanation of the circumstances causing the delay shall be recorded in the case record. Among the factors which might require a longer period of time to complete the investigation would be the necessity of awaiting reply for information from persons or agencies in another state or county, involved real or personal property situations, complications arising from medical or optometric reports on blindness, etc. (W&IC 103.3, 3081, 3082, 3472, 3474.5)

Certified as a Regulation
as Regulations) of the

Dept of Social Welfare
(Name of State Agency)

Charles J. Richardson
(Signature)

Director
(Title)

2-31-52
(Date)

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Earl Warren,
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

March 31, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of regulations issued by the State Department of Social Welfare with Old Age Security Manual Letter No. 8.

These regulations were adopted by the State Social Welfare Board on March 21, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

FILED
in the Office of the Secretary of State
of the State of California

MAR 31 1952

At 3:05 o'clock P.M.

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE
616 K STREET
SACRAMENTO 14

FILED

in the Office of the Secretary of State
of the State of California

MAR 31 1952

March 28, 1952

At.....o'clock.....M.

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

OLD AGE SECURITY MANUAL LETTER NO. 8

The attached revisions numbered 34 through 40 are to be entered in your copy of the Manual of Policies and Procedures - Old Age Security and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on March 21, 1952, to be effective May 1, 1952.

Section A-206 has been added to include in the manual a statement of county responsibility in the application process.

Section A-303 sets forth an important revised policy governing prompt processing of new applications, including the final step of making payment to eligible applicants.

Section A-487 has been revised to include statements of increased fees for U. S. Census record searches and to include the new request form required by the Census Bureau.

The following department bulletins are obsolete:

371
388D
388D Supp.
397

A-204 (Continued)

A-204

who are either (1) clearly not presumptive applicants, i.e., the general public, or (2) not willing to identify themselves. A request for information may, in the course of an interview, develop into a request for aid.

A request for aid is made when the individual indicates that he is in need and asks for financial assistance. If he lacks sufficient information to be specific about the assistance program for which he might qualify, the county shall provide the necessary information.

A request for aid is considered an application when the application Form Ag 200 or Ag 200-B has been completed and signed by the applicant, his authorized representative or legal guardian, and acknowledged and filed with the county.

A request for restoration is a request for OAS by a former recipient whose OAS grant was discontinued by the same county within twelve months prior to the date of the request. (See Sec. A-280, Restoration of Aid and Sec. A-284, Reapplication or Restoration Following Discontinuance Due to Employment)

A reapplication is a request for OAS received by the county from or on behalf of a person (a) whose former application to the same county was denied or voluntarily withdrawn, or (b) whose aid has been discontinued for a period of more than 12 months. An application form (Form AG 200) is required for each reapplication except as provided in Sec. A-232, When Application to be Taken. (W&IC 2140)

A-206 COUNTY RESPONSIBILITY IN THE APPLICATION PROCESS

A-206

The county's responsibility in the application process is to receive requests and applications, and requests for restoration, to assist applicants in securing evidence of eligibility, to determine eligibility or ineligibility, to authorize and assure issuance of payments to eligible persons, to provide information as to availability of services by other agencies, and to provide such other services as the individual may require and the county may be able to render. (W&IC 2022, 2140, 2180)

A-208 COUNTY CARD FILES AND CONTROLS

A-208

A written record of all requests for aid and restoration of aid shall be kept, whether made orally (in person or by telephone) or in writing, even though an application form is not signed.

The record of requests for aid shall be maintained in a permanent card file so as to be readily available for review. The following information shall be shown:

1. Aid program
2. Name and address of the applicant
3. Date of request

(Section Continued on Next Page)

A-200 THE APPLICATION PROCESS- GENERAL

A-200

The application process begins when the individual indicates that he is in need and requests financial assistance. It is completed when the county takes action either granting or denying aid. Exception: County action to dispose of the application is not required if the applicant withdraws his application or if the application is cancelled upon the death of the applicant. (See Sec. A-272, Disposal of Applications)

The application interview in which the applicant and county worker begin the joint exploration of eligibility is an especially important one because the impressions received by the applicant are carried over to future county relationships. The person may not know the kind of assistance he desires or the exact nature of the aid which he requests. Applicants may come to the county with definite preconceptions about the particular type of aid they seek. They may find it difficult to accept the idea that they must be "in need" and that this need must be established. The interview will provide the joint opportunity for an interpretation of the objectives and limitations of the program and a discussion of the applicant's part in the determination of eligibility. The applicant should be informed of his responsibility for notifying the county immediately of any change of address, or change in financial condition, including change in income or need or in real or personal property holdings.

The confidential nature of county records regarding applicants for, or recipients of, OAS should likewise be explained in the application interview. Many individuals reveal information under the stress of dire need which they would not otherwise disclose. It may be inimical to their interest or to the public interest to have such information disclosed. Protection is provided through legal enactment and by rulings governing the confidentiality of information about an applicant or recipient.

If ineligibility is definitely established, the OAS application is denied at that point. If an applicant is ineligible for OAS, but appears to be eligible for assistance or service under some other program, either public or private, appropriate referral should be made.

The relationship with the public assistance worker of the county welfare department is often the only direct, continuing contact which the applicant or recipient has with his government. He receives an impression of the agency every time he contacts the office and every time a worker talks to him or writes to him. Thus, his attitude toward the agency and his government is often influenced by his experiences with the county welfare department. This department is the channel in which the effort of county, state and federal governments converge in programs designed to meet his needs. The application process may thus become the first step in the establishment of a good working relationship with the applicant. (Walc 2140)

A-204 DEFINITIONS

A-204

A request for information is one which is unrelated to a specific request for aid. It is made without the individual indicating that he is in need. He may only desire to obtain information relative to the assistance programs or points of agency policy. Such requests will usually be made by callers seeking information

(Section Continued on Next Page)

A-306 SCOPE AND METHOD OF INVESTIGATION

A-306

Although the method of determining eligibility is basically the same for all applicants and recipients, the extent of the investigation will vary depending on the particular circumstances involved.

The applicant or recipient is the primary source of verification in that he will frequently have records or documents in his possession which support his statements and which shall be used whenever possible in preference to obtaining the information through other sources. The exploration of facts concerning eligibility is a joint responsibility of the county worker and the applicant. Together they shall consider the information the applicant presents verbally and in the form of documents, and determine what additional information is needed, if any. Agreement is reached as to what sources will most satisfactorily provide any necessary additional evidence and who will obtain it -- the applicant, or the worker at the applicant's request.

Investigation should be undertaken with the full knowledge and consent of the applicant. If the information the applicant presents is incomplete or inconsistent the worker will share his evaluation of such evidence with the applicant and continue to enlist his help in obtaining clarification of the points at issue. If, however, the issue is such that eligibility cannot be established from facts supplied by the applicant or from sources he suggests, he may have to choose between giving permission for the worker to obtain additional information or having his application denied.

If an applicant is unable, physically or mentally, to present information to support his eligibility, responsibility rests upon the worker to take the initiative in obtaining information, sharing with the applicant the steps taken, sources used and the evaluation of information obtained.

The OAS Law contains certain provisions which govern the process of eligibility determination. These are summarized as follows:

1. No question, inquiry or recommendation under the OAS Law or the rules of the SDSW shall relate to the political or religious opinions or affiliations of any person and no grant or denial of aid under the OAS Law shall be in any way affected or influenced by such opinions or affiliations.
2. The public assistance worker shall conduct himself with courtesy, consideration and respect toward applicants and recipients. The worker shall endeavor at all times to perform his duties in such a manner as to secure for every aged person the maximum amount of aid for which that person is eligible. He shall not attempt to elicit any unnecessary information or make any comment or criticism of any fact concerning an applicant or recipient which is not directly connected with OAS.

(Section Continued on Next Page)

INVESTIGATION - GENERAL

A-300 DEFINITION

A-300

Investigation is the process of careful inquiry into the circumstances of the applicant or recipient in order to determine whether he meets the OAS eligibility requirements as established by law and the rules and regulations of the SDSW. It is a joint enterprise involving participation by the applicant or recipient, and includes:

1. Discussion of eligibility requirements with the individual who shall be assisted in presenting a complete picture of his circumstances.
2. Review of any documentary evidence in the individual's possession relating to the various points of eligibility.
3. Accumulation of additional documentary evidence when necessary.
4. Evaluation of the information secured, including reconsideration of any conflicting information.
5. Decision as to the individual's eligibility, and authorization of aid, if eligible. (W&IC 2140, 2160)

A-303 PROMPT COMPLETION OF INVESTIGATION

A-303

There shall be the shortest possible lapse of time between the date the application is signed and the date an eligible applicant receives the aid granted to him. In order to achieve this objective county procedure shall require that investigation be initiated immediately following receipt of an application, and be continued with diligence and without unnecessary delay through and including the action of the board of supervisors, or their duly authorized representative. Accounting procedure shall also be so geared as to provide for prompt disbursement of aid to persons eligible to receive it.

The objective can be considered to be achieved if aid is granted and paid to eligible applicants within 60 days from the date the application was signed; provided, however, that when all the evidence establishing eligibility has been secured in a lesser period of time, aid shall be granted and paid promptly, without waiting for expiration of the 60 day period. If, because of complicating factors requiring a longer period to complete the investigation, payment to any eligible applicant is delayed beyond 60 days after the application is signed, an explanation of the circumstances causing the delay shall be recorded in the case record. Among the factors which might require a longer period of time to complete the investigation would be the necessity of awaiting reply for information from persons or agencies in another state or county, involved real or personal property situations, complications in verification of citizenship of foreign born applicants, etc. (W&IC 103.3, 2140, 2181)

A-484 AFFIDAVITS OF INDIVIDUALS

A-484

Age may be established by means of a personal affidavit when it is made by a reputable person and is based upon his personal knowledge of facts which would determine the probable age of the applicant. The affidavit itself must contain a statement of the circumstances upon which the affiant's knowledge is based. An affidavit setting forth the age of an applicant which is based only upon his personal appearance is not satisfactory.

Caution and careful judgment must be exercised in evaluating the specific facts contained in the affidavit purporting to establish age. Affidavits signed by sisters or brothers should include a comparison of respective ages or other facts from which age is determined. The mere fact that the affiant is a brother or sister is not in itself adequate. (WAC 2140, 2162)

A-487 CENSUS RECORDS

A-487

The OAS Law provides that census records used to establish age must have been taken at least five years prior to the date of application.

A census report should be requested only when other satisfactory evidence is not available, and then only on the form recommended by the U. S. Bureau of Census. The form should be completed by the applicant or by someone who will exercise great care in securing accurate information from him and must bear the signature of the applicant. In filling out the form on which requests for information are made, it is important to give the exact address, including number, street name or names of cross streets between which house was located, precinct, post office, township, town, city, county or other local subdivision, and all spellings of the name or names involved. If living with parents at the time the census was taken, the names of the parents should be shown, and if living with other than parents, the head of the household should be shown.

A fee of \$3 shall accompany each request for a search of the census records. Requests for a search are handled in the order that the requests are received and there will be a delay of several weeks. An immediate search is made if the request is accompanied by a fee of \$4 which covers the cost of a special search. The fee for a search of the census records is a proper administrative expense, subject to Federal

(Section Continued on Next Page)

A-481 (Continued)

A-481

Records of all Indians included in the enrollment in California are on file in the office of the Superintendent of the Sacramento Indian Agency, Federal Building, Sacramento, California. It may be used if better evidence is not available.

The Superintendent of the Hoopa Valley Agency has census records as of 1898 and 1904 which are available for areas covered by this agency.

Most large reservations outside of California possess tribal rolls of long standing and regular, careful entry. Evidence from such records is accurate within reasonable limitations.

Additional information may be found in the allotment records which often show age. In petitioning for an allotment, generally before 1910, the Indian gave his age (probably an approximate age as the information was incidental to the purpose of the petition). Allotment records are filed in each of the Indian agencies in California.

The Indian Agencies in California follow: Hoopa Valley Agency, Eureka, California. This includes the following counties: Del Norte, Humboldt, Siskiyou and Trinity.

Sacramento Agency: Sacramento, California. This includes 44 counties extending from Modoc in the North to Santa Barbara in the South. These counties are: Alameda, Amador, Butte, Calaveras, Colusa, Contra Costa, El Dorado, Fresno, Glenn, Kern, Kings, Lake, Lassen, Madera, Marin, Mariposa, Mendocino, Merced, Modoc, Monterey, Napa, Nevada, Placer, Plumas, Sacramento, San Benito, San Francisco, San Joaquin, San Luis Obispo, San Mateo, Santa Clara, Santa Cruz, Shasta, Sierra, Solano, Sonoma, Stanislaus, Sutter, Tehama, Tulare, Tuolumne, Yolo and Yuba.

Carson Nevada Agency: Stewart, Nevada. This includes the following California counties: Alpine, Mono, Inyo.

Mission Agency: Riverside, California. This includes the following counties: Imperial, Los Angeles, Orange, Riverside, Santa Barbara, San Bernardino, San Diego, and Ventura, except that a small portion of the eastern end of San Bernardino and Imperial counties is not under the Mission Agency, but under the Colorado River Agency. (W&IC 2140)

A-487 (Continued)

A-487

The Censuses of 1880, 1900, and 1920 are indexed by states. Complete information from these three censuses should be given in filling out the application. Other files which are most nearly complete and adequate are those of 1870 and 1910, in the order given. The schedules for the year 1890 were damaged by fire and are not available for use.

Records which show the names and the ages of all members of the family are:

June 1, 1850

June 1, 1880

January 1, 1920

June 1, 1860

June 1, 1900

April 1, 1930

June 1, 1870

April 15, 1910

A search will be made of the 1900 schedule whenever possible as the information will be most readily available for that year. Data for other census dates should be included, however, as certain facts may have to be corroborated. (WAC 2140, 2162)

(Section Continued on Next Page)

A-487 (Continued)

A-487

matching, to be borne by the county. A certified check or a money order made payable to the Treasurer of the U. S. shall be sent to the Census Bureau, Washington, D. C., with the request. These fees cannot be refunded if the information is not located.

Statements of individuals are the basis of census records. These are not made under oath and frequently are made by other than the person enumerated. If the information in the census record appears to have been given by the applicant, or by his parent, and the record establishes that the age of 65 has not been reached, this information can be refuted only by evidence to the contrary. If it is clear from the census that the age information was given by other than the applicant or his parent, a reasonable explanation for the variance may be accepted. The county should give greatest weight to the evidence that appears to be most accurate. Corresponding evaluation and judgment is necessary if the preponderance of evidence indicates a younger age, whereas the census record establishes that the age of 65 has been reached.

The first United States census was taken in 1790 and has been repeated at ten-year intervals since that date. Records from 1790 to 1870 are open to the public. Records from 1900 on are confidential and are available only to the individuals concerned, their legally appointed guardians, or to agencies or persons authorized by the individuals concerned to secure the information from the Census Bureau. The records vary in form and adequacy. All of the schedules, except that of 1900, are arranged by the year, the state, the geographical subdivision, and the exact address. They are not arranged alphabetically. Therefore, in order to secure evidence of age from the census of any year, except 1900, it is necessary to have the exact address of the applicant at the date the census was taken.

(Section Continued on Next Page)

A-487 (Continued)

A-487

Form AdS-430
(Rev. 2-1-52)U. S. DEPARTMENT OF COMMERCE
Bureau of the Census
Washington 25, D. C.

INSTRUCTIONS FOR REQUESTING A SEARCH OF FEDERAL CENSUS RECORDS

The law provides a penalty for knowingly and wilfully making a false statement to any department or agency of the United States as to any matter within its jurisdiction

(1) Use the application on the reverse side of this sheet in requesting a search of the Census records and a copy of the personal information found, which includes age, place of birth, and citizenship. Fill in and mail this application to the Bureau of the Census, Washington 25, D. C., together with a money order or certified check payable to the Treasurer of the United States, Washington, D. C., in the amount of either \$3.00 or \$4.00, or more, as follows:

(a) \$3.00 for a search in regular turn of not more than two (2) censuses for one (1) person. This type of search is handled in order of receipt of applications and usually takes several weeks.

(b) \$4.00 for a search ahead of \$3.00 searches of not more than two (2) censuses for one (1) person. This type of search usually takes less than 2 weeks.

(c) If search of more than two censuses should be necessary send one additional fee for each two (2) additional censuses to be searched, and state accordingly under "FEE REQUIRED" on reverse side. For instance, if searches are desired in five or six censuses, send \$9.00 for handling in regular turn, or \$12.00 for handling ahead of \$3.00 searches.

Note.--It is not usually necessary to send more than one fee with your application. If the search made for the one fee is not successful you will be notified and advised that an additional fee will be required before further search can be made.

(d) The charge for each additional copy of census information is \$1.00.

(e) EXCEPTION: The fee for a search for genealogical or historical purposes will be estimated upon request (minimum \$3.00).

DO NOT SEND CURRENCY OR STAMPS in payment of the fee.

Note.--Remittances in currency are sent through the mail at the sender's risk. Stamps cannot be accepted at all in payment of the fee.

(f) The fee cannot be refunded if search has been made even though the record is not found, as it pays the cost of the search.

(2) Census search preferred. The earliest possible census or censuses will be searched unless this column on the reverse side is otherwise marked.

(3) Regular birth certificates are not issued by the Census Bureau, but by the health department of the State

in which the birth occurred. At the Federal Censuses, however, the Census takers obtained the age and place of birth of individuals. Copies of Census records are often accepted as one piece of evidence of age and place of birth for employment, Social Security benefits, insurance, and other purposes.

(4) Names in the Census records are not arranged alphabetically but in the order in which recorded by each Census taker. Therefore, to enable the Bureau to locate a person's record, give the following:

(a) Exact place of residence of the individual on the date of a Federal Census. If living in a city, give the name of the street and either the number of the house or the names of the cross streets between which the house was located. If in the country, give the name of the county, town, village or township, and the number of the district, precinct, or beat.

(b) Name of the parent or other head of household with whom residing at the time of the Census.

(5) The personal information recorded at the Census of 1900 and later censuses is confidential and may be furnished only if desired for a proper purpose, upon the written request of the person himself or his legal representative (such as guardian of the person or administrator of the estate, upon presentation of the court order naming the legal representative or parent of a child now under 16 years of age). Generally, the information will only be given as stated above.

THE PURPOSE FOR WHICH THE INFORMATION IS TO BE USED MUST BE STATED IN ALL CASES.

If you are requesting the Census record of another person, state under "Remarks" on reverse side, or on a separate sheet, your relationship to the person and whether the information would be used to the detriment of the person or persons to whom it relates. If the record is needed in cases of citizenship, insurance benefits, etc., explain under "Remarks."

(6) Information from the 1880 Census records may be furnished for genealogical, historical, and other proper purposes. Be sure to state purpose. For fee, see 1-e, above.

(7) If you authorize the Census Bureau to send the record to someone other than yourself (see lower left-hand corner of reverse side), your attention is called to the possibility that the information shown in the Census record may not agree with that given in your application. The record must be copied exactly as it appears, and will be sent as you direct, regardless of what it shows.

U. S. Government Printing Office 16--53170-3

A-487

Form AdS-430 (Rev. 2-1-52)		For a search of Census records fill in this form as completely as possible and sign it See instructions on reverse side				DO NOT USE THIS SPACE	
Bureau of the Census, Washington 25, D. C. Gentlemen: I hereby apply for the Census record of:						No. _____	
Date _____							
FULL NAME OF PERSON WHOSE CENSUS RECORD IS REQUESTED: (Print or type) _____						NICKNAMES _____ RACE _____	
MAIDEN NAME _____ DATE OF BIRTH _____						PLACE OF BIRTH _____	
FULL NAME OF FATHER _____				FULL NAME OF HUSBAND OR WIFE OF PERSON WHOSE RECORD IS REQUESTED		FIRST MARRIAGE _____ SECOND MARRIAGE _____ THIRD MARRIAGE _____	
FULL NAME OF MOTHER _____							
Census search preferred ☒		GIVE EXACT PLACE OF RESIDENCE AT EACH DATE LISTED BELOW					
CENSUS DATE		NUMBER AND STREET (Very important)	CITY, TOWN, TOWNSHIP (Precinct, beat, etc.)	COUNTY AND STATE	NAME OF PERSON WITH WHOM LIVING (Head of household)		
June 1, 1880							
June 1, 1900							
April 15, 1910							
Jan. 1, 1920							
April 1, 1930							
April 1, 1940							
REMARKS (See Para. 5 on reverse side):				PURPOSE FOR WHICH RECORD IS TO BE USED (MUST BE STATED) _____			
This authorizes the Census Bureau to send the record to: (If other than to applicant, give name and address of person or agency. See paragraph 7 on reverse side.)				FEE REQUIRED: A money order or certified check payable to the Treasurer of the United States must be sent with this application.			
				DO NOT SEND CASH (Check type of service requested)			
				☐ \$3.00 for a search in regular turn of not more than two (2) censuses for one (1) person, OR			
				☐ \$4.00 for a search ahead of \$3 searches of not more than two (2) censuses for one (1) person, OR			
* The 1890 Census records were destroyed by fire.				☐ \$ _____ for other service _____			
				(See 1(c) and (d) on reverse side)			
				SIGNATURE OF APPLICANT (Do not print) _____			
				PRESENT ADDRESS OF APPLICANT NUMBER AND STREET _____ CITY _____ ZONE _____ STATE _____			
				IF SIGNED ABOVE BY MARK (X), TWO WIT- NESSES MUST SIGN HERE.			
				(See reverse side)			

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

May 29, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Manual Letter No. 157.

These regulations were adopted by the State Social Welfare Board on May 15, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, 103.6, and 114b, and are being filed in accordance with Sections 11380 and 11422 of the Government Code.

These regulations are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public interest.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

Certified as a Regulation.
(as Regulations) of the

Department of Social Welfare
(Name of State Agency)

Charles I. Scholand
(Signature)

Director
(Title)

5-29-52
(Date)

MANUAL LETTER NO. 157

The attached revisions are to be entered in your copy of the Manual of Policies and Procedures and revision numbers 97 and 98 canceled on the separator of the Welfare Personnel Standards Chapter.

These revisions were adopted by the Social Welfare Board on May 15, 1952, to be effective June 1, 1952.

Revised Sec. 080-20 and new Sec. 080-08 make it possible for counties to make special work assignments of personnel for educational training purposes with federal reimbursement for administrative expense on the same basis as though the employee were employed on a full-time basis.

The following department bulletins are obsolete:

371	392
388-D	397
388-D, Supp.	440-C

FILED
In the office of the Secretary of State
of the State of California

MAY 29 1952

FRANK M. JORDAN, Secretary of State

By

[Signature]
Assistant Secretary of State

Notwithstanding any other provisions of these rules, an appointing authority may assign a limited number of personnel, full or part time, to educational training in a field directly related to the employee's work assignment. Such assignment shall be made only if it is consistent with a satisfactory carrying out of the day to day work in the welfare department. The following further conditions apply:

1. Such assignment may be made without approval from the SDSW if the period of assignment for any employee does not exceed one calendar month in any year, or 90 hours in any six months' period.
2. Any other such assignment must have prior approval from the SDSW.
3. Only employees who have permanent or probationary status shall be eligible for assignment to educational training as outlined in this section.
4. Educational institutions must meet the standards formulated by the accrediting associations in professional fields of study or by the accrediting associations for general education where there is no professional association established in the particular field.

(W&IC 119.5, 119.6, FSSA)

An Educational Leave Committee shall be appointed by the Director of the SDSW to develop policies on educational leave, make decisions on applications, and determine amounts of payments and periods of study.

The Educational Leave Committee shall advise the SDSW on policies and practices regarding special work assignment for educational training (Sec. 080-20), and shall review qualification standards for such assignments and shall assist the SDSW in the evaluation of such projects. (W&IC 119.5, 119.6, FSS-Admin.) (a)

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In the office of the Secretary of State
of the State of California

MAY 29 1952

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

(a) Revised in accordance with new Sec. 080-20

Certified as a Regulation (●
as Regulations) of the

Department of Social Welfare
(Name of State Agency)

C. J. S. Ireland

(Signature)

Director

(Title)

5-29-52

(Date)

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Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND

DIRECTOR

May 29, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:
616 K Street
Sacramento 14

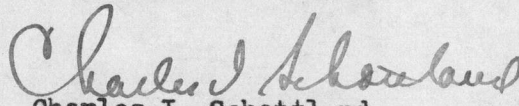
Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Old Age Security Manual Letter No. 9.

These regulations were adopted by the State Social Welfare Board on May 15, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

These regulations are effective July 1, 1952.

Very sincerely yours,


Charles I. Schottland
Director

Attachments

OLD AGE SECURITY MANUAL LETTER NO. 9

The attached revisions numbered 41 through 45 are to be entered in your copy of the Manual of Policies and Procedures - OAS and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on May 15, 1952 to be effective July 1, 1952.

Sec. A-208 has been revised to require recording of information in the county's control on pending applications in order that it will reflect the dates on which certain steps in the investigation process were completed; also to require that controls be established to insure prompt delivery of warrants to eligible applicants. The necessity for these controls arises out of the new policy governing "reasonable promptness" in the application process. (Sec. A-303)

Sec. A-740 has been revised to correct an error thus making it consistent with Code Section 2165 d relating to proceeds from the sale of real property.

Sec. A-1352 reflects an important change in the policy governing federal participation. It becomes effective July 1, 1952 and is the result of amendment to the Federal Social Security Act. Note that there will be no federal participation in any payments made for July 1952 or subsequent months to recipients who are patients in private institutions maintained for the purpose of treatment of tuberculosis or mental disease, or to patients in other private medical institutions as a result of diagnosis of tuberculosis or psychosis. Since the state law was not amended such persons, if otherwise eligible, will continue to receive assistance without federal participation.

Sec. A-920 as revised sets forth circumstances under which no federal participation is available in the first payment made to an applicant who is an inmate of a public institution.

FILED
In the office of the Secretary of State
of the State of California
MAY 29 1952
FRANK M. JORDAN, Secretary of State
By *[Signature]*
Assistant Secretary of State

Sufficient card controls and files shall be maintained in the county to insure that (1) identification and clearance can readily be made to expedite the processing of applications and to eliminate duplication, and that (2) action is taken when due.

The county shall maintain a permanent card file of all persons who have made a request for aid, as defined in Sec. A-204. These cards shall be filed so as to be readily available for review and shall include the following information: (a)

1. Aid program
2. Name and address of the applicant
3. Date of request
4. Nature of request
5. Disposition of request
6. If no application is signed, the reason the applicant did not continue with the application.

If a request for aid is made but the application is not signed, the information secured during the interview shall be recorded in a manner which will be helpful in the event of a later application or a complaint.

If a request for aid becomes an application, ^{a control} ~~the card~~ shall be ^{setup for} ~~filed in~~ the "pending applications" control file after the date the application is signed and the state number ~~has been entered on the card~~. The following additional information shall be entered on the control ~~card~~.

1. The date evidence necessary to the establishment of eligibility was secured, i.e., the date the certification of eligibility was signed by the caseworker, or by the case supervisor, if the latter is required by the county. (a)
2. The date aid is authorized ^{or denied} by action of the board of supervisors or its delegated agent.

The county shall also provide for suitable controls to insure that warrants are delivered promptly after aid is authorized in accordance with Sec. A-303, Prompt Completion of Investigation.

Such other card files and controls as may be necessary shall be maintained in connection with:

1. Pending applications, reapplications, and restorations (a)
2. Cases in which an application has been signed but aid has been denied or discontinued, or in which the application has been canceled or withdrawn.

(Section Continued on Next Page)

(a) To include provisions for control on prompt processing of applications.

3. Active cases currently receiving aid
4. Annual reinvestigations of eligibility
5. Transfers of cases to another county or from another county
6. Completion of required period of county residence on non-county cases
7. All requests for aid even though an application is not signed.

(a)

(W&IC 2140)

(a) To include provisions for control on prompt processing of applications.

✱

~~D Differentiation of Personal Property and Income~~

~~Item 7 of Section A-740 is erroneous in that it refers to the exempt character of proceeds received from sale of "the home." As last amended W&IC Section 2165d provides that proceeds from conversion of "real property" shall be considered real property for a period of six months if they are to be used for purpose of buying a home.~~

~~The proposed section as amended was not included in the Agenda for the May 14 meeting with the County Welfare Policy Committee. It merely corrects the existing error and makes the section consistent with Section A-765 and Code Section 2165d as amended.~~

A-740 DIFFERENTIATION OF PERSONAL PROPERTY
(Rev.) AND INCOME

A-740

When money is received by a recipient, decision must be made as to whether such money represents income or whether it represents personal property immediately upon receipt. In general, the source of the money and the recurrence of the payment are the determining factors. Net proceeds from the following sources are to be considered personal property:

1. Payments received because of judgments or as out-of-court settlements, or non-recurring lump sum payments received because of compensation laws; as used herein judgment refers to a punitive judgment granted because of damages sustained by the person or his property; (See Sec. A-735, Evaluation of Personal Property, Item 12.)
2. Personal property received through inheritance, either by will or succession;
3. Cash received in a lump sum by the insured from the surrender or maturing of insurance policies;
4. Cash received by the recipient as beneficiary of an insurance policy or policies carried by the deceased spouse, including OASI lump sum death payments received by the recipient as spouse of an insured worker;
5. Cash received as a refund of excess premium payments (special dividend) on National Service Life Insurance;
6. Non-recurrent lump sum payments received by the recipient and/or his spouse from retirement or pension systems of which he or she was a former member; for example, State Employees Retirement System, Federal Employees Retirement Fund under the U. S. Civil Service Commission, retirement plans of private corporations, etc.;
7. The net return resulting from the sale of real or personal property, including the proceeds resulting from the sale of an entire holding of livestock, poultry, etc. Exception: Proceeds (cash and securities) received from the sale of real property shall not be considered in determining personal property holdings for 6 months after receipt, provided the proceeds are to be used to purchase a home, (See Sec. A-765, Conversion of Real or Personal Property.) (a)
8. Personal income tax refunds.

(W&IC 2140, 2163, 2165d)

(a) Correction to conform to W&IC 2165d and to correspond with Sec. A-765.

An inmate of a public institution may apply for aid. If otherwise eligible, aid shall be granted provided the applicant has a bona fide plan to move from the institution following receipt of the first payment. Aid shall be paid from the first day of the month in which the application is granted except that no aid shall be paid for any period prior to the date the application was signed. Likewise aid shall be granted to an eligible applicant who became an inmate of a public institution after the application was signed.

An eligible applicant is entitled to receive his initial warrant while an inmate of the institution, but not more than one warrant may be delivered to him there. Should the applicant remain in the institution after the last day of the month for which the initial warrant is paid, he is ineligible for the warrant for the next month and for each succeeding month up to the month following that in which he leaves the institution. Under such circumstances federal participation is not available in the one warrant paid to the applicant while in the institution.
(See Sec. A-1352) (a)

Example: An inmate of a public institution signed an application on October 8. The applicant planned to leave the institution in November. Aid is granted on November 26, effective November 1, and the November warrant is delivered to the applicant at the institution on November 29. The applicant moves from the institution on December 4. The warrant for December is canceled because the applicant did not leave the institution until after November 30. Aid is paid effective January 1 if the applicant remains otherwise eligible.

(There is no federal participation in the November Warrant as the applicant did not leave the institution during the month of November). (a)

A Certificate of Delivery of Payment of Aid (Form AB 231), relating to the second warrant delivered to a person who left the institution within the month for which the first warrant was paid, shall be completed and filed in the case record. On Form AB 231 the person delivering the warrant certifies to the date the applicant left the institution, and the date the warrant was delivered. (See Sec. A-252, Applications of Persons on Leave From State Hospitals.)

Portions of this section not relevant to changes are omitted from this agenda
--

FILED

In the office of the Secretary of State
of the State of California

MAY 29 1952

Portions of this section not relevant to
changes are omitted from this agenda

FRANK M. JORDAN, Secretary of State

By

Assistant Secretary of State

Patients in Public Medical Institutions

With certain exceptions there is federal participation in payments for two calendar months made to patients in public medical institutions. See Sec. A-930, Eligibility While in a Public Medical Institution, for definition of "patient" and "public medical institution" and for circumstances under which federal participation is available.

Patients in Private Hospitals and Private Institutions

Federal participation is available in payments made to patients in private hospitals or private institutions. Exception: Federal participation is not available in payments to patients in private hospitals or private institutions maintained for the purpose of treating persons suffering from tuberculosis or mental disease or when the patient is in another type of private hospital or institution with a diagnosis of tuberculosis or psychosis. Federal participation is therefore not available in payments to recipients in private homes or institutions licensed by the State Department of Mental Hygiene to care for the mentally ill or in private tuberculosis institutions licensed by the State Department of Public Health.

(a)

If Federal participation is in order on the first day of the month, the Federal Government participates in the payment for the full month although the recipient may be admitted to a tuberculosis or mental hospital during the month.

Applicants in Public Institutions

When an initial warrant is paid to an inmate of a public institution in accord with the provisions of Sec. A-920, Eligibility While in A Public Institution, there is federal participation in that warrant provided the inmate leaves the institution before the end of the month for which the warrant is paid. Should the inmate fail to leave the institution until after the last day of the month for which the initial warrant is paid, there is no federal participation in such initial warrant.

Guardianship

There is no federal participation in payments made to a guardian who is an employee of the SDMH. (See Sec. A-228, Person Making Application, Sub-section C) (W&IC 2140, 2183.9, 2186; FSS Admin)

(a) To conform to federal requirements

Certified as a Regulation (or
as Regulations) of the

Department of Social Welfare
(Name of State Agency)

C. J. Schreiner
(Signature)

Director
(Title)

5-29-52
(Date)

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
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12

SACRAMENTO OFFICE
GILBERT 2-4711
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GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

May 29, 1952

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

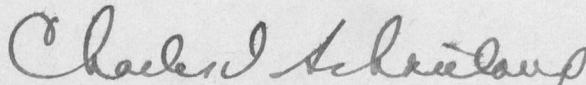
ADDRESS REPLY TO:
616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Aid to Needy Children Manual Letter No. 17.

These regulations were adopted by the State Social Welfare Board on May 15, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.5, and 114(b), and are being filed in accordance with Section 11380 of the Government Code.

Very sincerely yours,



Charles I. Schottland
Director

Attachments

AID TO NEEDY CHILDREN MANUAL LETTER NO. 17

The attached revisions numbered 167 through 180 are to be entered in your copy of the Manual of Policies and Procedures - ANC and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on May 15, 1952, to be effective July 1, 1952.

Sec. C-165 has been deleted since the instructions for reporting actions on applications are more adequately covered by current Department Bulletins No. 433 and 439.

Sec. C-170 has been revised to require recording of information in the county's control on pending applications in order that it will reflect the dates on which certain steps in the investigation process were completed; also to require that controls be established to insure prompt delivery of warrants to eligible applicants. The necessity for these controls arises out of the new policy governing "reasonable promptness" in the application process.

Sec. C-503 has been revised to establish the budget item for recreation and personal needs on a family budget unit basis rather than on an individual basis.

Sec. C-504 has been amended to provide for a revised Form CA 241, Budget Work Sheet, and instructions for completion. Under this amended section any county may design and use its own Budget Work Sheet provided the substitute form is approved by the SDSW.

All budget work sheets in use in the counties, including county designed substitutes previously approved by the SDSW, become obsolete by Form CA 241, Revised June 1952. Therefore, it is necessary for counties that plan to use ^{develop} their own substitute budget work sheets to submit copies to the SDSW as soon as possible in order that they be given the timely consideration.

Form CA 241, Revised June 1952, becomes effective July 1, 1952. However, since the new cost schedules need not be put into effect prior to October 1, 1952, counties will have until that date to install the new budget work sheets.

FILED

In the office of the Secretary of State
of the State of California

MAY 29 1952

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

C-165 REPORTING ACTION ON APPLICATION TO SDSW
(Deletion)

C-165
(a)

(a) Superseded by Department Bulletin No. 433 and 439

Sufficient card controls and files shall be maintained in the county to insure that (1) identification and clearance can readily be made to expedite the processing of applications and to eliminate duplication, and that (2) action is taken when due.

The county shall maintain a permanent card file of all persons who have made a request for assistance, as defined in Sec. C-105. These cards shall be filed so as to be readily available for review and shall include the following information:

(a)

1. Name and address of the applicant
2. Name of child or children
3. Number in the family
4. Date of the request
5. Nature of the request
6. Disposition of the request
7. If no application is signed, the reason the applicant did not continue with the application

If a request for assistance is made but the application is not signed, the information secured during the interview should be recorded in a manner which would be helpful in the event of a later application or a complaint.

set up for If a request for assistance becomes an application, ^{a control} ~~the card~~ shall be ~~filed in the "pending applications"~~ ^{shall be} control file after the date the application is signed and the state number ~~has been entered on the card.~~ The following additional information shall be entered on the control ~~card.~~

1. The date evidence necessary to the establishment of eligibility was secured, i.e., the date the certification of eligibility was signed by the caseworker, or by the case supervisor, if the latter is required by the county.
2. The date assistance is authorized ^{or denied} by action of the board of supervisors or its delegated agent.

(a)

The county shall also provide for suitable controls to insure that warrants are delivered promptly after assistance is authorized in accordance with Sec. C-201, Prompt Determination of Eligibility.

Such other card files and controls as may be necessary shall be maintained in connection with:

1. Pending applications and restorations
 2. Cases in which an application has been signed but assistance has been denied or discontinued or in which the application has been canceled or withdrawn
 3. Active cases currently receiving assistance
 4. Annual redeterminations of eligibility
 5. Transfers of cases to another county or from another county
 6. Completion of required period of county residence on non-county cases
 7. Other anticipated action, such as discontinuance at the age of 18 years, determination of school status, etc.
 8. All requests for assistance even though an application is not signed.
- (W&IC 1560)

(a) To include provisions for control on prompt processing of applications.

Items A through E of this section are not relevant to the change and are omitted from this agenda.

F. NEEDS COMMON TO ALL FAMILY BUDGET UNITS

The goods and services essential to a minimum basic standard of adequate care for all family budget units, whether the children are living with their own families or with relatives, and the rules for computing the family budget are as follows:

1. Food

The amount for food given in the Cost Schedule shall be included for each individual in the family budget unit (see Item G-1 for Special Diets and G-2 for Restaurant Meals).

Family budget units of only one or two persons shall be allowed an additional 10% for food, if food is prepared for a household of only one or two persons.

See Item G-3 of this section for special food allowance for a family in which the mother is working.

2. Clothing

The amount for clothing given in the Cost Schedule shall be included to cover current replacements in clothing for each individual in the family budget unit.

Clothing for a child's first year shall be included as needed in either:

- a. A lump sum before or after the child is born, or
- b. Prorated over a period before or after the birth, or both.

3. Personal Needs, Recreation, Household Operation, and Education and Incidentals

The amount for personal needs, recreation, household operation, and education and incidentals given in the Cost Schedule shall be included in accordance with the number in the family budget unit. However, the combined amount included in the budget for this item and life insurance (see Item G 9 of this section) for the entire family budget unit shall not exceed the following amounts: (a)

<u>Number of Eligible Children in the Family Budget Unit</u>	<u>Ceiling Amount</u>
1	\$ 13
2	15
3	18

<u>Number of Eligible Children in the Family Budget Unit</u>	<u>Ceiling Amount</u>
4	\$ 21
5	24
6	26
7	28
8	30
9	32
10	33
11	34
12 or more	35

(a)

This item covers:

- a. Personal needs such as haircuts, tooth brushes, hair brushes, combs, toilet soap, cosmetics, shaving supplies, sanitary supplies, etc. For infants it includes mineral oil, vaseline, boric acid, sterile cotton, nursing bottles and nipples.
- b. Recreation such as movies, scout dues, school activities, fishing tackle, toys, etc.
- c. Household operation such as cleaning and laundry supplies including brooms, mops, wash boards, soap, and bleach; mending supplies including darning cotton, needles, and thread; medicine chest supplies including band aids, hotwater bottles, aspirin, and iodine; and minor replacements in minimum amounts including light globes, household linens, and bedding.
- d. Education and incidentals such as postage, stationery, magazines, or a newspaper.

4. Housing

a. Rent

The amount of rent paid shall be included for each family budget unit up to the ceiling given in the Cost Schedule. (The ceiling is set for each county at an amount covering actual rents for approximately 90 percent of the cases.)

The amount of actual rent paid by the family budget unit and a statement as to what such rental includes shall be recorded in the narrative.

b. Allowances for Home Owned, Encumbered, or Being Purchased

Monthly amounts shall be included for the home owned, encumbered, or being purchased and occupied by the family, as follows:

- (1) Monthly prorata of taxes paid.
- (2) Monthly prorata of assessments paid, not included in the taxes.

(a) Change in policy.

- (3) Monthly prorata of fire insurance paid.
- (4) Allowance for upkeep and minor repairs, as follows:

<u>Assessed Valuation</u>	<u>Minimum Allowance per Month</u>
Under \$1,000	\$2.00
\$1,000 - \$1,999	2.50
\$2,000 - \$3,000	3.00

- (5) Monthly prorata of amount to cover interest and principal payments on encumbrances.

The total amount for taxes, insurance, upkeep and repairs, interest, and principal shall be determined and shall be included for each family budget unit up to the rent ceiling given in the Cost Schedule.

5. Utilities

The amounts given in the Cost Schedule for those utilities used by the family and not included in the rent (e.g., gas for cooking, electricity for lighting, wood for heating) shall be included in accordance with the number in the family budget unit.

The average monthly amount of the cost of ice, if needed, shall be included up to the maximum allowance indicated on the Cost Schedule.

If there are others in the household not included in the family budget unit, only the prorated share of the amounts for utilities given in the Cost Schedule in accordance with the total number of persons in the household is allocable to the family budget unit.

If a utility used by the family is not listed on the Cost Schedule, the county shall determine and include the average monthly amount necessary on an annual basis. The basis of the county's determination shall be recorded in the narrative.

G. NEEDS NOT COMMON TO ALL FAMILY BUDGET UNITS

The goods and services essential to a minimum adequate standard of living but not common to all family budget units and the rules for including these needs in the family budget are listed below. For needs that are specifically related to a program of vocational rehabilitation for a parent or a program to assist in the maintenance and self-support for a family, see Item H of this section. Needs, other than those listed, that arise must be met by other resources in the community or by relatives or friends.

Items G 1 through G 8 are not relevant to the change and are omitted from this agenda.

9. Life Insurance

The county shall determine and record in the narrative whether or not life insurance policies are carried on the parents or children. (See Sec. C-340, Determination of Personal Property)

If life insurance policies are carried on parents or on children under the age of 18 years, the actual amount of the premiums shall be included, up to a total of \$4 a month for the family. Exception shall be made in either of the following situations:

- a. If premiums are in excess of \$4 and a downward adjustment of the premium is pending, the excess amount shall be included for a period not to exceed three months.
- b. If policies are carried on an incapacitated parent either in or out of the home, the excess amount necessary to keep the insurance in effect shall be included.

However, the combined amount included in the budget for life insurance and personal needs, recreation, household operation, and education and incidentals for the entire family budget unit shall not exceed the ceiling amount shown in Item F-3 of this section.

The remainder of this section is not relevant to the change and is omitted from this agenda.
--

The Budget Work Sheet, Form CA 241, shall be used in computing the amount of the assistance payment for children in family groups or with relatives in accordance with Sec. C-503, unless the county has a substitute form approved by the SDSW.

The Cost Schedule, Form Gen M45, together with the Special Diet Folder, and Sec. C-503, Item F, G, and H should be consulted for current allowances for needs common to all family budget units and for the needs and the ceilings on amounts to be allowed for those needs not common to all family budget units.

Each time there is a change in need or income, regardless of the temporary nature of the change, a new budget shall be computed and retained in the case record to substantiate the amount of the assistance payment. This form is so designed that three different computations may be made on the one form. If the totals for Items B, C, D, or E remain unchanged in a subsequent computation, only the totals need be entered in the computation, provided that across the appropriate spaces of the budget work sheet is written, "Unchanged, see budget eff. _____," or a similar clear explanation.
date

Complete the identifying information at the top of the form as indicated. Designation of the District, County Number, or address is discretionary with the county.

Effective Date - Enter the date the budget is to be effective for each budget computation made.

- Item A. Summary of Persons in the Household - Information summarized in this section provides for prorating shares of expenses and for determining ceilings and amounts to be allowed. (a)
- Item A-1. Enter the number of persons in the family budget unit at the time of the effective date of each computation. This is the total of the persons listed in Item B.
- Item A-2. Enter the number of persons in the household at the time of the effective date of each computation. This is the total of the persons listed in Item B and Item N (on the reverse side). This and Item A-1 above provide a fraction
$$\frac{\text{No. of persons in family budget unit}}{\text{No. of persons in household}}$$
 which shall be used to prorate the family budget unit's share of the needs shared by the household in Item E, if there are other persons living in the household.
- Item A-3. Enter the number of children eligible for Aid to Needy Children at the time of the effective date of each computation. This is the total number of checks in the second column of Item B for children in the home at the time of the effective date of the computation.
- Item B. Food and Clothing for Family Budget Unit - This section provides spaces for adding the individual amounts given on the Cost Schedules

for food and clothing to obtain the total amount for the family budget unit.

Items B-1 through B-8. Enter the names of all persons included in the family budget unit as specified in Sec. C-503, Item B. If there are more than eight such persons, two names may be crowded into one line. If a person is added to the family budget unit subsequent to the first computation, the name shall be added to the list. If a person is deleted from the family budget unit subsequent to the first computation, ~~enter~~ ^{draw} a line in the appropriate food and clothing column.

If the person listed is a child eligible for Aid to Needy Children, enter a check mark. If a person deleted from the budget is an eligible child, draw a line through the check mark; if he later becomes eligible, enter another check. The total number of checks is entered in Item A-3 above. (Eligibility for federal participation is not a factor in computing the budget or determining the amount of the payment.)

In the column "Sex" enter an "M" or "F", whichever is appropriate.

In the column "Birthdate", enter the month and year of birth for each person less than 18 years of age. If the person is 18 or over, enter "adult". If one of the members of the family budget unit is a stepfather, enter "SF" in this column.

Enter the amount given on the Cost Schedule for food and clothing for each person listed in accordance with the proper sex and age grouping.

(a)

Item B-9. Enter the total of the amounts for clothing for the members of the family budget unit listed in the column above.

Item B-10. Enter the total of the amounts for food for the members of the family budget unit listed in the column above.

Item B-11. If the family budget unit consists of one or two persons only, (see Sec. C-503, Item F-1) or if the mother who prepares the meals is regularly employed outside the home or is engaged in a vocational program (see Sec. C-503, Item G-3), enter 10% of the amount shown in Item B-10. If both conditions exist, enter only one 10%.

Item B-12. Enter the total of Items B-10 and B-11. If there is no amount shown in Item B-11, this item will be the same as Item B-10.

Item C. Needs Having Statutory Ceiling for -- Eligible Children - This section provides spaces for adding the amounts for the five needs having a total statutory ceiling based on the number of children eligible for Aid to Needy Children and for applying the ceiling amount when applicable. The number of children eligible for Aid to Needy Children is to be entered in the space provided and is obtained from Item A-3.

(a) To conform to revised Form CA 241.

- Item C-1. Enter the amount given on the Cost Schedule for the number of persons in the family budget unit for household operations, education and incidentals, recreation, and personal needs.
- Item C-2. Enter the actual amount of the life insurance premiums paid by the family for the parents or children under 18 years of age, up to \$4 per month. (See Sec. C-503, Item G-9)
- Item C-3. Enter the total of Items C-1 and C-2.
- Item C-4. Enter the ceiling amount for the number of children eligible for Aid to Needy Children in the family budget unit included in Sec. C-503, Item F-3.
- Item C-5. Enter the amount in Item C-3 or C-4, whichever is less. In no event shall the amount in this item exceed the amount of the ceiling in Item C-4.
- Item D. Other Needs Not Common to all Family Budget Units - This section provides spaces for entering other needs which are not common to all family budget units excluding those needs shared by the entire household.
- Items D-1 through ^{D-3}~~4~~. Enter the needs and the amounts for needs not common to all family budget units in accordance with Sec. C-503, Items G and H. Do not include those needs which are shared by the entire household if there are other persons living in the household as such needs should be listed in Item E-3.
- Item D-⁴~~5~~. Enter the total of Items D-1 through ⁴~~5~~ D-3 (a)
- Item E. Needs Shared by Household - This section provides spaces for entering the needs which are shared by the household if there are other persons living in the household. It also provides for the prorating of these expenses to determine the share allocable to the family budget unit.
- In the column "Amount for Household" enter the cost or the amount given on the Cost Schedule for the need. In the column "~~F.B.U. Unit~~ Share," enter the family budget unit's proportionate share of the amount entered in the column "Amount for Household". The family budget unit's share is computed by multiplying the "Amount for Household" by the fraction in Item A-1 and ~~A-2~~ ^{the instructions for Item A-2} ~~(Number of persons in family budget unit)~~ ~~(Total persons in household who share)~~.
- Item E-1. Check the appropriate box, i.e., either "rent" or, if the family owns or is purchasing the home, "property." If rent is checked, enter the actual amount of rent paid in "Amount for Household." If the family receives free rent, enter "free." If there are no others in the household and this amount does not exceed the county ceiling, or it does exceed the ceiling and one of the special circumstances outlined in Sec. C-503, Item G-5 applies, enter the same amount in the column "~~F.B.U. Unit~~ Share." If there are others in the household, enter the family budget unit's proportionate share

(a) To conform to revised Form CA 241.

(computed as described in Item E). If the family budget unit's share exceeds the ceiling for the county, and none of the special circumstances apply, draw a line through the amount already entered and enter above this the ceiling amount.

If "property" is checked, enter in the column "Amount for Household" the total of the monthly prorata of taxes paid, assessments paid (and not included in the taxes), fire insurance paid, and interest and principal payments on encumbrances paid, and the allowance for upkeep and minor repairs in accordance with Sec. C-503, Item F-4-b, as computed in Item P. In the column "~~F.B.U.~~ ^{Family Budget Unit} Share," enter the family budget unit's proportionate share as for "rent" above. The rental ceiling shall be applied to this amount as for "rent".

- Item E-2, a through ^{E-2}d. Enter the type of utility used by the family and not included in the rent. Entries for the column "Amount for Household" need be made only if there are other persons living in the household. If there are other persons present, enter the amount given in the Cost Schedule for the total number of persons in the household. In the column "~~F.B.U.~~ ^{Family Budget Unit} Share," enter the Cost Schedule amount for the number of persons in the family budget unit if there are no others in the household or enter the family budget unit's proportionate share of the amount for the household if there are other persons present. This is computed by multiplying the "Amount for the Household" by the fraction in Item A-1 and A-2. ~~the instructions for Item A-2.~~
- Item E-3. List the other needs not common to all family budget units which are shared by the household and enter the amount for the household and the family budget unit's proportionate share, applying ceilings where indicated (See Sec. C-503, Item G). (a)
- Item E-4. Enter the total of the family budget unit's share of Items E-1 through ~~E-3~~ ^{E-2}.
- Item F. Total Needs of Family Budget Unit - This section provides spaces for totalling the amounts in Items B through E.
- Item F-1. Enter the total amount for clothing for the family budget unit as shown in Item B-9.
- Item F-2. Enter the total amount for food for the family budget unit as shown in Item B-12.
- Item F-3. Enter the amount for needs having a statutory ceiling for the family budget unit as shown in Item C-5.
- Item F-4. Enter the amount for other needs not common to all family budget unit's as shown in Item D-4.
- Item F-5. Enter the amount of the family budget unit's share of all needs shared by the household as shown in Item E-4.
- Item F-6. Enter the total of Items F-1 through ^{F-5}5. This is the amount of the total budgetary needs of the family budget unit.

(a) To conform to revised Form CA 241.

X

- Item G. Total Net Income to F.B.U. - Enter the amount of the total net income available to the family budget unit. This is the amount shown in Item C-14 on the reverse of this form.
- Item H. Budgetary Deficiency for F.B.U. - Enter the difference between the amount in Item F-6, Total Budget, and the amount in Item G, Total Net Income to F.B.U. *Family Budget Unit.*
- Item I. Amount of Assistance to Which Eligible - Enter the amount of the assistance payment ~~for~~ which the family is eligible. This amount shall not exceed the amount in Item H, rounded to the nearer dollar. It shall equal the amount in Item H, rounded to the nearer dollar, if Item H does not exceed the participating base. (See Sec. C-527 for other exceptions in increases and decreases if the budgetary deficiency differs less than \$2 from the currently authorized payment.) If the budgetary deficiency (Item H) exceeds the participating base and there is no county supplementation, enter the amount of the participating base. If the budgetary deficiency (Item H) exceeds the participating base and county supplementation is paid, enter the sum of the participating base and county supplementation.
- If overpayment is being adjusted and county policy provides for the deduction of overpayment for prior months from the budgetary deficiency even though supplementary assistance will not be paid in excess of the participating base, enter the amount in Item H.
- Item J. Unmet Need - Enter the difference between the amount of the budgetary deficiency (Item H) and the amount of assistance ~~for~~ which eligible (Item I). In no event should there be unmet need if the budgetary deficiency is less than the participating base (Item ~~I~~) except in increases or decreases in payment (See Sec. C-527). (a)
- Item K. Amount of Overpayment to be Adjusted - If overpayment of assistance occurred in the two months preceding the effective date of the budget being computed, enter the amount of such overpayment.
- Item L. Amount of Assistance to Be Paid - Enter the difference between the amount of assistance ~~for~~ which eligible (Item I) and the amount of overpayment to be adjusted (Item K). If no overpayment occurred, this entry will be identical with Item I.
- Item M. Participating Base - Enter the participating base for the number of children eligible for Aid to Needy Children who are living in the same home with a parent or other relative.

Budget Computed by - The name, initials, or other identification of the person computing the budget shall be entered as well as the date the computation is made.

Budget
Reviewed by - The name, initials, or other identification of the person reviewing and approving the computation, if any, shall be entered with the date of approval.

Reverse Side of Form

Effective Date - Enter the date the column being completed is to be effective.

(a) To conform to revised Form CA 241.

- Item N. Others in Household - This section provides spaces for listing the other members of the household not included in the family budget unit.
- Items N-1 through ⁶6. List the names of other persons living in the household and enter the relationship to the youngest eligible child in the appropriate column. A check in the column for the effective date of the budget being computed indicates the presence of the person in the household at that time. Additions to or deletions from the household members are indicated for the different periods by the checks or the omission of the check.
- Item O. Net Income to the Family Budget Unit - This section provides spaces for entering the sources and amounts of the net income available to the support of the family budget unit. Net income shall be determined in accordance with the provisions of the Secs. C-350 through C-390 and the determination shall be recorded in the narrative or shown on Form CA 241A, Work Sheet for Computation of Net Income and Total Income Available (optional).
- Items O-1 through ¹⁰10. Enter the amount of net income from any of the sources listed as of the effective date of the budget.
- Items O-11 through ¹³13. Enter the source and the amount of net income from sources other than those listed above.
- Item O-14. Enter the total of Items O-1 through 13. This amount is also entered in Item G on the reverse of this form. (a)
- Item P. Computation of Property Expense - This section provides spaces for computing the amount of property expense for the household to be entered in Item E-1.
- Item P-1. Enter the amount of the monthly payment on the encumbrance on the property, if any, including principal and interest. If there is no encumbrance, enter "clear."
- Item P-2. Enter the amount of the annual taxes on the property in the bracketed space and enter the prorata monthly amount (1/12) in the budget column.
- Item P-3. Enter the amount of the annual assessment on the property not included in the taxes, if any, in the bracketed space and enter the prorata monthly amount (1/12) in the budget column.
- Item P-4. Enter the amount of the fire insurance paid, if any, and the fraction for the number of months this amount covers in the bracketed space. (N.B. Fire insurance is usually written for 3 year periods so that the fraction would be 1/36.) Enter the prorata monthly amount in the budget column.
- Item P-5. Enter the applicable amount for upkeep and repairs from the table in Sec. C-503, Item F, 4,b,(4).

(a) To conform to revised Form CA 241.

Item P-6. Enter the total of Items P-1 through ^P5. This amount also is entered in Item E-1 on the reverse side of this form.

Item Q. Remarks - This space is provided for explanatory information deemed necessary.

(a)

If assistance paid is wholly or partially in kind or in controlled payments or multiple payments, explain the method of payment.

(W+9C1560)

FILED

In the office of the Secretary of State
of the State of California

MAY 29 1952

FRANK M. JORDAN, Secretary of State

By _____
Assistant Secretary of State

(a) To conform to revised Form CA 241.

Case Name and Address				Co. and Co. No.		State No.		District	
Effective Date									
A. SUMMARY OF PERSONS IN HOUSEHOLD:									
1. Number of persons in Family Budget Unit - Item B									
2. Total persons in household who share Item E below									
3. Number of children eligible for A.N.C.									
B. FOOD AND CLOTHING FOR FAMILY BUDGET UNIT				Child is Eligible for ANC	S E X	Birth-date	FOOD	CLOTHING	
Name									
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9. Total Clothing for Family Budget Unit									
10. Food for Family Budget Unit									
11. 10% additional for 1 & 2 F.B.U. or emp. mother									
12. Total Food for Family Budget Unit									
C. NEEDS HAVING STATUTORY CEILING FOR ELIGIBLE CHILDREN									
1. Household Operation, Educ. & Incident., Recr., Pers. Needs									
2. Insurance									
3. Total - C-1 and C-2									
4. Statutory Ceiling Amount of C-1 and C-2									
5. Amount in Line 3 or 4, whichever is less									
D. OTHER NEEDS NOT COMMON TO ALL FAMILY BUDGET UNITS									
1.									
2.									
3.									
4. Total, Other Needs not common to all Family Budget Units									
E. NEEDS SHARED BY HOUSEHOLD				Amount for Household	F. B. U. Share	Amount for Household	F. B. U. Share	Amount for Household	F. B. U. Share
1. ☐ Rent ☐ Property (including taxes, fire ins., assessments, upkeep & repairs)									
2. Utilities									
a. Electricity									
b. Gas or butane									
c.									
d.									
3. Other Needs shared by persons in household:									
a.									
b.									
4. Total of Family Budget Unit's share									
F. TOTAL NEEDS OF FAMILY BUDGET UNIT									
1. Total of B9 - Clothing									
2. Total of B12 - Food									
3. Total of C5 - Needs having ceiling									
4. Total of D4 - Other needs									
5. Total of E4 - Needs shared by household									
6. Total Budget									
G. TOTAL NET INCOME TO F. B. U. (See reverse of sheet for details)									
H. BUDGETARY DEFICIENCY FOR F. B. U. (F6 minus G)									
I. AMOUNT OF ASSISTANCE TO WHICH ELIGIBLE									
J. UNMET NEED (H minus I)									

Effective Date

N. OTHERS IN HOUSEHOLD

Name	Relationship to Youngest Elig. Child	Check if in Household	Check if in Household	Check if in Household
1.				
2.				
3.				
4.				
5.				
6.				

O. NET INCOME TO FAMILY BUDGET UNIT
Source of Income

	Amount	Amount	Amount
1. Net earnings of mother in the home			
2. Net earnings of father in the home			
3. Net earnings of minors in the home			
4. Net income from others in the home			
5. Net income from program for self-support not included in Line 1 through 4			
6. Contribution from parent whose absence is cause of deprivation			
7. Contribution from parent otherwise absent			
8. Contribution from stepfather in the home			
9. Old Age & Survivors Insurance			
10. Veterans Benefits			
11.			
12.			
13.			
14. Total Net Income to Family Budget Unit (Enter in G on reverse side)			

P. COMPUTATION OF PROPERTY EXPENSE

1. Payment on encumbrance (Princ. & int.)			
2. Prorata of taxes (1/12 x \$)			
3. Prorata of assessments (1/12 x \$)			
4. Prorata of fire insurance (1/ x \$)			
5. Upkeep and repairs			
6. Total Property Expense (Enter in E-1. Amount for Household)			

Q. REMARKS

AREA OFFICES

LOS ANGELES OFFICE
MICHIGAN 8411
MIRROR BUILDING
145 SOUTH SPRING STREET
12

SACRAMENTO OFFICE
GILBERT 2-4711
924 NINTH STREET
14

SAN FRANCISCO OFFICE
EXBROOK 2-8751
GRAYSTONE BUILDING
948 MARKET STREET
2

Earl Warren
Governor

STATE HEADQUARTERS

SACRAMENTO
GILBERT 2-4711
616 K STREET
14

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES I. SCHOTTLAND
DIRECTOR

May 29, 1952

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

ADDRESS REPLY TO:

616 K Street
Sacramento 14

Dear Mr. Jordan:

Attached are three copies of the regulations which will be issued by the State Department of Social Welfare with Aid to the Blind Manual Letter No. 11.

These regulations were adopted by the State Social Welfare Board on May 15, 1952, pursuant to the powers conferred upon it by the Welfare and Institutions Code under Sections 103, 103.6, and 114(b), and are being filed in accordance with Sections 11380 and 11422 of the Government Code.

These regulations are effective July 1, 1952, except for Sec. B-542 which is effective June 1, 1952.

The regulations in Section B-542 are to be effective immediately upon filing with the Secretary of State, since this has been found necessary for the immediate preservation of the public peace, health and safety or general welfare and that notice and public procedure thereon are impracticable, unnecessary or contrary to the public procedure.

Also attached are three copies of Aid to the Blind Manual Letter No. 10 effective June 1, 1952.

Very sincerely yours,

Charles I. Schottland
Charles I. Schottland
Director

Attachments

AID TO THE BLIND MANUAL LETTER NO. 11

The attached revisions numbered 87 through 93 are to be entered in your copy of the Manual of Policies and Procedures - Aid to the Blind and the revision numbers canceled on the inside of the manual cover.

These revisions were adopted by the Social Welfare Board on May 15, 1952. Sec. B-542 is effective June 1, 1952, and Secs. B-175, B-512, and B-752 are effective July 1, 1952.

Sec. B-175 has been revised to require recording of information in the county's control on pending applications in order that it will reflect the dates on which certain steps in the investigation process were completed; also to require that controls be established to insure prompt delivery of warrants to eligible applicants. The necessity for these controls arises out of the new policy governing "reasonable promptness" in the application process.

Sec. B-542, as revised, provides that not only General Relief but also the value of basic needs provided by the Orientation Center for the Blind and the California School for the Blind are not considered as exempt income in APSB.

Sec. B-512 as revised sets forth circumstances under which no federal participation is available in the first payment made to an applicant who is an inmate of a public institution.

Sec. B-752 reflects an important change in the policy governing federal participation. It becomes effective July 1, 1952 and is the result of amendment to the Federal Social Security Act. Note that there will be no federal participation in any payments made for July 1952 or subsequent months to recipients who are patients in private institutions maintained for the purpose of treatment of tuberculosis or mental disease, or to patients in other private medical institutions as a result of diagnosis of tuberculosis or psychosis. Since the state law was not amended such persons, if otherwise eligible, will continue to receive assistance without federal participation.

FILED

In the office of the Secretary of State
of the State of California

MAY 29 1952

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Assistant Secretary of State

Sufficient card controls and files shall be maintained in the county to insure that (1) identification and clearance can readily be made to expedite the processing of applications and to eliminate duplication, and that (2) action is taken when due.

The county shall maintain a permanent card file of all persons who have made a request for aid, as defined in Sec. B-120. These cards shall be filed so as to be readily available for review and shall include the following information:

1. Aid program
2. Name and address of the applicant
3. Date of request
4. Nature of request
5. Disposition of request
6. If no application is signed, the reason the applicant did not continue with the application.

(a)

If a request for aid is made but the application is not signed, the information secured during the interview shall be recorded in a manner which will be helpful in the event of a later application or a complaint.

If a request for aid becomes an application, ~~the card shall be filed in~~ ^{a control} the "pending applications" control file after the date the application is signed and the state number ~~has been entered on the card~~ ^{shall be}. The following additional information shall be entered on the control ~~card~~.

1. The date evidence necessary to the establishment of eligibility was secured, i.e., the date the certification of eligibility was signed by the caseworker, or by the case supervisor, if the latter is required by the county.
2. The date aid is authorized ^{or denied} by action of the board of supervisors or its delegated agent.

The county shall also provide for suitable controls to insure that warrants are delivered promptly after aid is authorized in accordance with Sec. B-207, Prompt Completion of Investigation.

(Section Continued on Next Page)

(a) To include provisions for control on prompt processing of applications.

Such other card files and controls as may be necessary shall be maintained in connection with:

1. Pending applications, reapplications, and restorations
2. Cases in which an application has been signed, but aid has been denied or discontinued, or in which the application has been canceled or withdrawn
3. Active cases currently receiving aid
4. Annual redeterminations of eligibility
5. Transfers of cases to another county or from another county
6. Completion of required period of county residence on non-county cases
7. All requests for aid even though an application is not signed.

(W&IC 3075, 3460)

The purpose of the following proposed revision to Sec. B-542 is to provide that not only general relief but also the value of basic needs provided by the Orientation Center for the Blind and the California School for the Blind are not considered as exempt income.

B-542 EXEMPT INCOME IN APSB
(Rev.)

B-542

The annual net income of a recipient of APSB from all sources of a combined total value not exceeding \$1,000, increased by one-half of that part of his annual net income which is in excess of \$1,000, shall be considered exempt income in determining the amount of aid. Exception: (1) Income either in the form of general relief which is granted for any part of the period covered by the first APSB warrant; or (2) the value of basic needs furnished without charge to the recipient by State Orientation Centers for the Blind or the California School for the Blind, is not exempt income. (See Sec. B-509; Residents of Certain Institutions Not Considered Inmates). Such income shall be considered in determining the grant of APSB for any month in which such income is received.

(a)

Net income shall be determined by deducting from the gross income the expenses which are incident to its receipt.

If an application for APSB has been approved, the recipient shall be entitled to receive the maximum amount of aid each month, and retain net income up to \$1,000 within any one yearly income period. If a person has net income of more than \$1,000 in a given yearly period, an amount equal to one-half of that part of his monthly income which is in excess of \$1,000 is deductible from the maximum grant until the end of the yearly income period. (See Sec. B-642, Adjustment in Amount of Aid.)

If the recipient is making an allocation to his spouse, no adjustment shall be made until the support of the spouse has been met, but in no event shall the amount allocated to the support of the spouse exceed \$1,000 in a given yearly period. Such allocation shall not be made until the recipient has had his full maximum of \$1,000 exempt income. (See Sec. B-538, Division of Income with Spouse.)

An applicant (including original application, restoration, annual redetermination, transfer from ANB, and reapplication) for APSB who has a regular monthly net income in excess of \$168.33 is ineligible for APSB even though he has a spouse without other means of support.

An educational scholarship, which has been awarded to a recipient of APSB while he is regularly attending any public school in this state or any institution of higher learning in this state, shall not be deemed property, income, or resource for any purpose, and no deduction shall be made from the recipient's amount of aid because of such scholarship. (W&IC 3400, 3447, 3460, 3472)

(a) Change in policy

The statement appearing on Page 1 is applicable to proposed revision to Section B-752 and B-512 which follow:

B-752 FEDERAL PARTICIPATION IN ANB
(Rev.)

B-752

There is no federal participation in APSB

A. Initial Payments

The first payments made on new applications and restorations are initial payments. Federal participation is available in initial payments provided the county action occurs within the month for which the aid is granted and the warrant is delivered during the same month or not later in the following month than the time when such payment would normally be issued under the county's customary fiscal procedure. Exception: There is no Federal participation in the initial warrant paid to an inmate of a public institution in accord with Sec. B-512, if the recipient fails to move from the institution within the month for which the warrant is paid.

(a)

Federal participation is available in initial payments as follows:

1. If a retroactive payment has been made to adjust an appeal which has been filed, but not yet heard by the SSWB, or to carry out an appeal decision by the SSWB. The Federal Government participates in the payment for all or any part of the period during which the appeal was pending, plus the month during which the appeal was signed and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.
2. If an application for aid has been improperly denied and such action is later rescinded. The Federal Government participates in the payment for the month in which the rescinding action was taken and the two preceding months, provided such period does not antedate the month in which payment was improperly denied or withheld.
3. If the beginning date of aid originally established on an application is not in accordance with the legal provisions of the W&IC and a subsequent corrective action is taken beginning aid at an earlier date. The Federal Government participates provided the retroactive aid is not for a month(s) prior to the month of the original action and further provided that the corrective action is taken by the end of the second month following that in which the original action was taken.

Example 1: An application which was signed on July 15
was approved by the county on September 15, aid to start

(a) To meet federal requirements.

effective October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of the W&IC. On November 2 the county takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is federal participation in the warrant issued in November for September as there would have been no retroactive initial payment if the original action in September had been correct.

Example 2: An application which was signed on June 15 was approved by the county on October 15, aid to begin October 1. On October 25 the county discovers that aid should have been effective September 1 according to the provisions of the W&IC. On November 2 the county takes action correcting the erroneous beginning date of aid by ordering aid paid effective September 1. There is no federal participation in the aid paid in November for September as the original action occurred in October. Had aid been correctly approved from September 1 in October, there would have been no federal participation as the initial payment would have been retroactive.

Item B not relevant to changes being omitted from this agenda
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C. Hospitalization

Federal participation is available for a recipient receiving medical or surgical care in a public medical institution in accordance with Sec. B-521, Recipients in Public Medical Institutions--Federal Reimbursement.

Federal participation is available in payments to patients in private hospitals or private institutions. Exception: Federal participation is not available in payments to patients in private hospitals or private institutions maintained for the purpose of treating persons suffering from tuberculosis or mental disease or if the patient is in another type of private hospital or institution with a diagnosis of tuberculosis or psychosis. Federal participation is therefore not available in payments to recipients in private homes or institutions licensed by the State Department of Mental Hygiene to care for the mentally ill or in private tuberculosis institutions licensed by the State Department of Public Health.

(a)

If federal participation is in order on the first day of the month, the Federal Government participates in the payment for the full month although the recipient may be admitted to a tuberculosis or mental hospital during the month.

D. Guardianship

There is no federal participation in payments made to a guardian who is an employee of the SDMH. (See Sec. B-155, Guardianship.)

(a) To meet federal requirements.